Scotinform

ST ANDREWS PARTNERSHIP

ST ANDREWS VISITOR SURVEY 2010

FINAL REPORT

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Market Research
Market Intelligence

INVESTOR IN PEOPLE

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1. INTRODUCTION

1.1 Background

St Andrews is widely regarded as the major tourism location within the Kingdom of Fife. Known worldwide as the “home of golf”, the city’s famous links is the most frequent venue for The British Open Championship, the oldest of golf's four major championships. The town is also home to the University of St Andrews, the third oldest university in the English-speaking world and one of the UK's most prestigious. The University is an integral part of the burgh, and during term time students make up approximately one third of the town's c16,680 population, making it the fifth largest settlement in Fife.

The St Andrews Partnership was established in 2009. The Partnership unites public bodies, business groups, voluntary organisations and community representatives in a shared interest - making St Andrews an even better place to live, work, study and visit.

The St Andrews Partnership Action Plan, 2010-2012 sets out a series of activities to be carried out during 2010-12. Addressing actions under three themes; *‘Environment’*, *‘Economy’* and *‘Community’* the plan aims to contribute to the overall goal of the Partnership - to assist St Andrews to set *‘Scotland’s standards of excellence’*.

Specifically, the *‘Economy’* theme aims to support, sustain and/or grow the St Andrews economy and under this rationale the Partnership commissioned the 2010 St Andrews Visitor Survey, the aim of which was to provide up-to-date knowledge of St Andrews visitors’ profile, activities, expenditure and experiences in St Andrews.

Scotinform Ltd was commissioned to undertake a visitor survey on behalf of the St Andrews Partnership. The survey findings will provide the Partnership with robust visitor intelligence to inform potential marketing and product development.

Throughout 2010, Scotinform conducted quantitative research with visitors to St Andrews and provided quarterly report on the findings. In addition, qualitative research was undertaken with visitors during July-September 2010 and a separate report provided in October 2010. This report brings together all the research results in one combined document – presenting the results from 1,516 quantitative face to face interviews conducted throughout 2010, and including findings from the qualitative research.

1.2 Research Aims and Objectives

The main aim of the study was to provide data which will provide a baseline for the Partnership and inform the development of relevant initiatives.

Specific objectives associated with the study were to:

- Establish a profile of visitors to St Andrews
- Identify how visitors travel to St Andrews and how they spend their time in the town
- Identify levels of satisfaction with St Andrews as a visitor destination
- Establish levels of expenditure in the town
- Provide an action plan, from the findings, which will inform future activities to be undertaken by the Partnership
- Provide a benchmark for future research as well as comparing results with the 2001-02 Fife Visitor Survey St Andrews figures
- Identify future research and evaluation to be undertaken by the St Andrews Partnership in the future

1.3 About this Report
This report presents overall findings from the quantitative and qualitative research conducted during 2010. Given the large sample (1,516) it will be possible to compare quantitative results across the four quarters e.g. January-March, April-June, and also by demographic information such as age, gender, place of residence. Where comparisons are made the results will be clearly explained. Where relevant, the report will also refer to results of the Fife Visitor Survey 2001-02 which included a sample of respondents from St Andrews.

When the report refers to 'respondents' this indicates people who took part in the quantitative survey, whereas when the report refers to participants this highlights people who took part in the qualitative research. Both forms of research are explained below in the methodology section.

Throughout the report in tables an * indicates a result of less than 1 percent and a - indicates no response at all. When responses do not add up to 100% this is due to no replies. When responses exceed 100% this is due to respondents supplying more than one answer.

2. METHODOLOGY AND SAMPLE

2.1 Quantitative Survey Methodology

The quantitative methodology adopted for this project was informed by the Fife Visitor Survey 2001-02. This survey involved a total of 1,612 face-to-face interviews with visitors to Fife during the period March 2001 to April 2002. As part of this survey 521 interviews were conducted with visitors to St Andrews. Where possible, in reporting the 2010 results comparisons have been drawn with the 2001-02 results.

During 2010 a total of 1,516 face-to-face interviews were conducted with visitors to St Andrews. The interviews were completed by trained interviews working in accordance with the Market Research Society Code of Conduct. To ensure a representative sample of visitors was included interviews took place at seven agreed locations in St Andrews:

- Church Square / Logies Lane area
- British Golf Museum / Royal & Ancient Embankment / Bruce Embankment
- Harbour at Foot Bridge
- St Andrews Bus Station
- East end of North Street (Cathedral)
- Entrance to car park at West Sands
- North Haugh Car Park

Interviews took place on weekdays and weekends, and at different times of day. Interviewees were approached on a 'next to pass' basis ensuring everyone in the area had a chance to take part. The proportion of visitors refusing to take part in the research was low so we have confidence that a representative sample was achieved.

Eligibility criteria for participation in the quantitative survey mirrored that adopted for the 2001-02 survey. Visitors were eligible to take part on the basis that they were:

- staying away from home for at least one night for the following purposes: on holiday, visiting friends and relatives on holiday, on business
- on a day trip to the area from another part of Scotland (not necessarily staying overnight in St Andrews)
- on a leisure day trip away from home for at least three hours duration

Those not included within the study included visitors:

- on a leisure day trip from home for a duration of under three hours
- on a leisure day trip from home, main purpose being shopping or personal business (e.g. going to dentist, attending a funeral)
- staying overnight visiting friends and relatives but not ON holiday (e.g. duty visits)

Within these definitions, respondents did not need to be staying overnight in Fife to be eligible for inclusion – for example, they could be on a day trip to the area from another part of Scotland. On the other hand, respondents who were staying overnight visiting friends and relatives, but not described as a holiday (e.g. duty visits) were excluded from the survey.

It should be noted, the following types of day-tripper were excluded from the surveys:

- Those on a leisure day trip from home…
    - For a duration of under three hours
    - whose main purpose was one of:
        - shopping
        - business
        - personal business (e.g. going to the dentist, attending a funeral etc.)

Table 2.1 details the number of interviews and those which have been completed.

Table 2.1: Interviews proposed/achieved

Quarter	Month	Number of interviews planned	Number of interviews achieved
Q1	January	75	29
	February	75	39
	March	100	126
	(January – March)	**(250)**	**(194)**
Q2	April	130	132
	May	130	0[1]
	June	130	131
	(April – June)	**(390)**	**(263)**
Q3	July	200	208
	August	200	269
	September	170	213
	(July-September)	**(570)**	**(690)**
Q4	October	140	177
	November	75	84
	December	75	108
	(October-December)	**(290)**	**(369)**
Total		**1,500**	**1,516**

[1] 130 questionnaires completed in May were misplaced by the Royal Mail. To rectify this shortfall, additional interviews were conducted over the remaining months of the year.

2.2 Qualitative Survey Methodology

The qualitative research involved a series of mini groups[2] which were recruited and facilitated by Scotinform on three separate days during the period July-September 2010. This methodology, which has been used extensively by Scotinform at visitor attractions, provided the opportunity:

- to talk to family groups including children
- for visitors to give reactions based on their immediate experience
- to engage with all types of visitors including day visitors and tourists – segments which may not be available at a later date
- to discuss stimulus material including maps
- to explore how the St Andrews visitor experience could be improved upon based on the visitor experience on the day on which visitors were interviewed

In July 2010, visitors were recruited in South Street and invited to take part in group discussions within the Town Hall in Queens Gardens. In August and September, the mini groups were conducted in the Visitor Information Centre (VIC) in Market Street which has sufficient space at the front of the building to sit down and discuss St Andrews with its visitors.

The groups were facilitated using a topic guide prepared by Scotinform and approved by the client group prior to the research commencing. A further topic was added to the topic guide for the third day of interviews – this was to explore levels of interest in cycle hire in St Andrews similar to that currently offered in the other UK towns and cities such as Blackpool.

A total of 69 visitors took part in this element of the study with the profile of visitors detailed in Table 2.2 below. The majority of visitors were first-time visitors to St Andrews and female. Visitors from the rest of the UK and overseas were most likely staying in St Andrews whilst Scottish residents tended to be on a day visit to the city.

Table 2.2: Profile of qualitative participants

Groups	Number of visitors
Family groups	8
Adult groups	12
Male visitors	27
Female visitors	42
Scotland	25
Rest of UK	22
Overseas	22
First time visitor	44
Repeat visitor	25

Overseas visitors were visiting Scotland from Belgium, Germany, the Netherlands, Portugal, Spain the USA and China. Those from elsewhere in the UK were from Cheshire, Derbyshire, Hampshire, Yorkshire and the West Midlands.

It was noticeable that most repeat visitors could be termed 'multiple' repeat visitors, with examples of six or more visits not uncommon.

[2] Mini-groups involve discussions with groups of 2-6 participants, often family/friend groups

3. RESEARCH FINDINGS

This section of the report presents the key findings from the quantitative interviews conducted with visitors to St Andrews during 2010. Where relevant this will include reference to seasonal and demographic variations and will also compare results to those collected for St Andrews in the Fife Visitor Survey 2001-02. Throughout the report we will also present findings from the qualitative research with participants undertaken during July-September 2010.

3.1 Profile of Respondents

Table 3.1 presents the profile of visitors to St Andrews interviewed during 2010 and highlights the following:

- In general there were more female than male visitors to St Andrews, except during Q3
- Respondents were most likely to be working full-time, retired or in education. These categories accounted for 83% of all visitors
- The majority of respondents did not have children aged under 16 years living at home and were either married or single (78%). This suggests most respondents were part of an adult group
- Across the year one third of respondents were from the ABC1 social classes
- One in every twenty respondents had a long standing illness or disability which affected them on a daily basis

Table 3.1: Profile of respondents – 2010 overall and by quarter
Base = all respondents

	2010	Q1	Q2	Q3	Q4
		%	%	%	%
Gender:					
Male	44	47	51	41	42
Female	56	52	49	58	58
Working status:					
Working full-time (More than 30 hours)	40	49	45	37	38
Working part-time (Less than 30 hours)	7	9	6	6	7
Self-employed	*	-	1	*	*
Retired	20	20	19	22	18
Unemployed	4	4	3	3	5
Out of work due to disability/illness	1	2	2	1	2
Carer for home/children	3	6	2	2	3
Full-time education	23	8	21	28	24
Children aged under 16 in household					
Yes	15	21	15	13	15
No	83	76	84	85	85

	2010	Q1	Q2	Q3	Q4
		%	%	%	%
Marital status:					
Single	38	22	32	43	42
Living with partner	9	10	12	6	12
Divorced/separated	4	7	5	3	6
Married	40	52	41	39	33
Widowed	6	8	6	6	7
SEG:					
AB	21	28	16	24	15
C1	43	30	44	45	44
C2	14	17	16	12	15
DE	12	9	11	12	15
Long-standing illness/disability					
Yes	5	11	6	3	3
No	94	85	93	96	96

It was possible to compare the profile of respondents in 2010 and 2001-02 on some demographic categories. The comparison shows that in 2010:

- fewer respondents were working full time whilst more were in full-time education
- fewer respondents had children aged under 16 in their household
- fewer respondents were married whilst more were single
- fewer respondents were from the AB socio-economic group, though ABC1 still accounted for the majority of respondents

Table 3.2: Profile of respondents - 2010 and 2001-02
Base = 2010 (1516), 2001-02 (521)

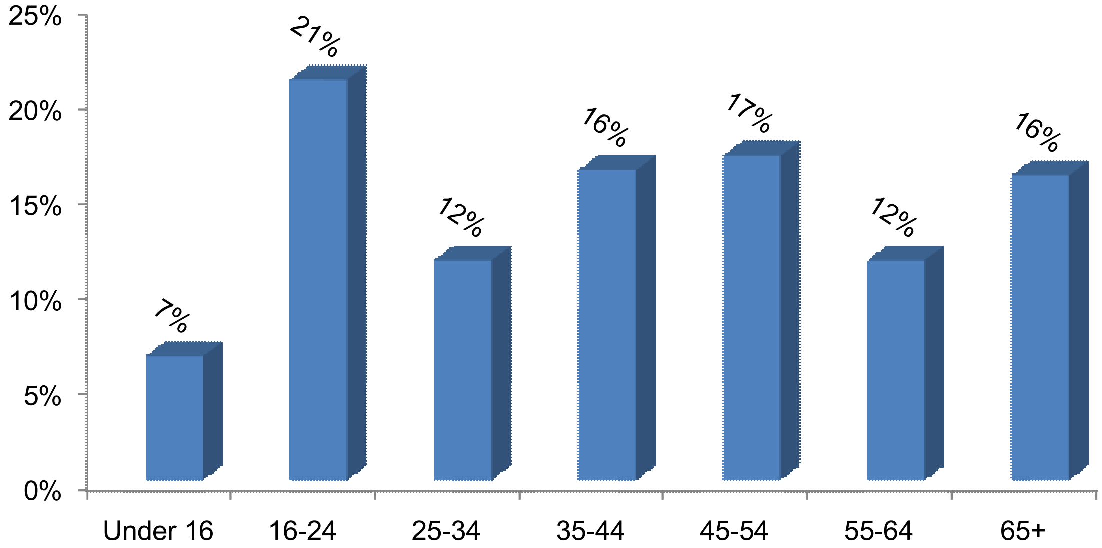
	2010	2001-02
	%	%
Working status:		
Working full-time (More than 30 hours)	40	60
Working part-time (Less than 30 hours)	7	7
Self-employed	*	n/a
Retired	20	18
Unemployed	4	2
Out of work due to disability/illness	1	n/a
Carer for home/children	3	4
Full-time education	23	8
Children aged under 16 in household		
Yes	15	29
No	83	71

	2010	2001-02
	%	%
Marital status:		
Single	38	26
Living with partner	9	4
Divorced/separated	4	4
Married	40	63
Widowed	6	4
SEG:		
AB	21	33
C1	43	46
C2	14	11
DE	12	9

3.2 Profile of Visitors

The profile of visitors with whom respondents were visiting is detailed below and highlights differences in visitors' age profile. Just 7% of visitors were aged under 16, in line with the finding that respondents were unlikely to have any children of this age living at home. The 21% of visitors aged 16-24 years old tallies with the findings that around one-quarter of respondents were in full-time education. Overall, all the age-groups are reasonably well represented with no one age cohort accounting for more than a fifth of visitors. This highlights that St Andrews appeals to a wide variety of people.

Chart 3.1: Age profile of visitors - 2010
Base = all visitors



Across the four quarters in 2010 the age profile of visitors remains quite consistent. The increase in the proportion of visitors aged 16-24 years old from 11% in Q1 to 26% in Q3 reflects University semesters.

Table 3.3: Age profile of visitors – 2010 overall and by quarter
Base = all visitors

	2010	Q1	Q2	Q3	Q4
	%	%	%	%	%
Under 16 years old	7	10	6	7	4
16-24 years old	21	11	17	26	21
25-34 years old	12	13	11	9	16
35-44 years old	16	15	20	16	14
45-54 years old	17	23	13	15	21
55-64 years old	12	18	11	11	10
65+ years old	16	11	22	16	13

In terms of gender, there was a consistent trend with more female visitors than male recorded in each quarter of the year. Overall, females accounted for 55% of visitors in 2010.

3.3 Place of Residence

Overall, 70% of respondents in 2010 were from Scotland or elsewhere in the UK with the remaining 30% from overseas. Reference to the collected demographics can tell us about each of these groups.

Scottish respondents represented 57% of respondents but accounted for the majority of:

- repeat visitors (78%)
- DE socio-economic respondents (76%)
- retired respondents (74%)

Overseas respondents represented 30% of respondents but were more likely to be:

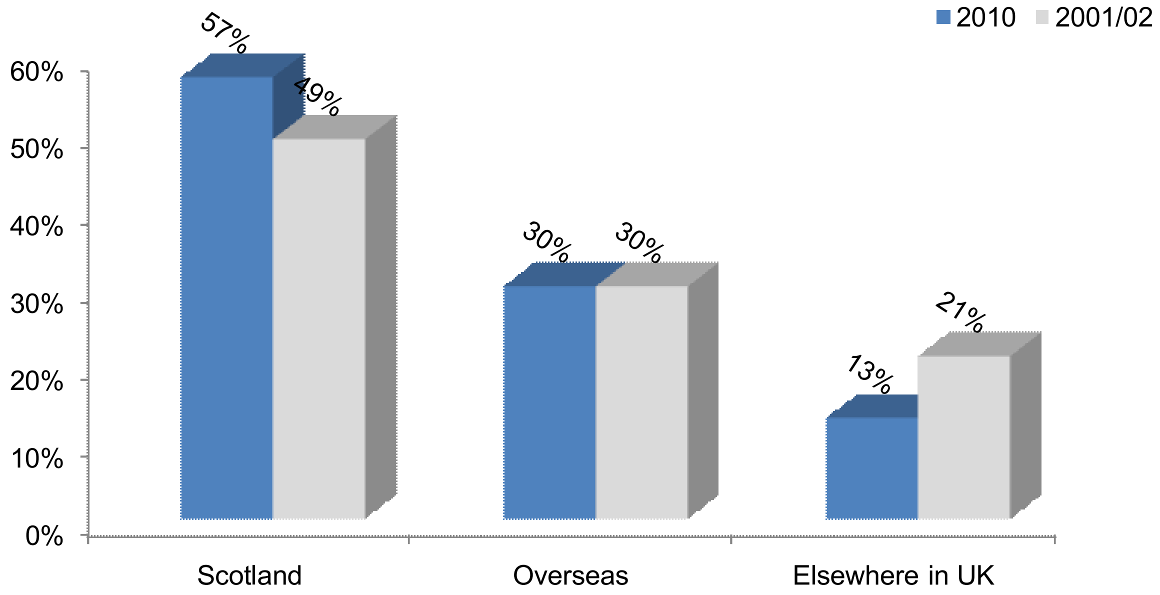
- first time visitors (66%)
- in education (41%)
- from the AB socio-economic group (39%)

Respondents from elsewhere in the UK made up 13% of respondents but were more likely to be:

- visiting in Q1 (26%)
- repeat visitors (17%)

Chart 3.2 also indicates that the profile of visitors' residence has remained similar between 2001-02 and 2010 although there has been an increase in Scottish visitors and a decrease in visitors from elsewhere in the UK.

Chart 3.2: Place of residence - 2010 and 2001-02
Base = 2010 (1516), 2001-02 (521)



Scottish visits peaked in Q4, replacing a shortfall in overseas visitors. Similarly, a shortfall of overseas visitors in Q1 was replaced by a greater proportion of visitors from elsewhere in the UK.

Table 3.4: Place of residence – 2010 overall and by quarter
Base = all respondents

	2010	**Q1**	**Q2**	**Q3**	**Q4**
	%	%	%	%	%
Scotland	57	55	59	53	66
Overseas	30	18	31	36	23
Elsewhere in UK	13	26	11	10	12

3.3.1 Overseas visitors – place of residence

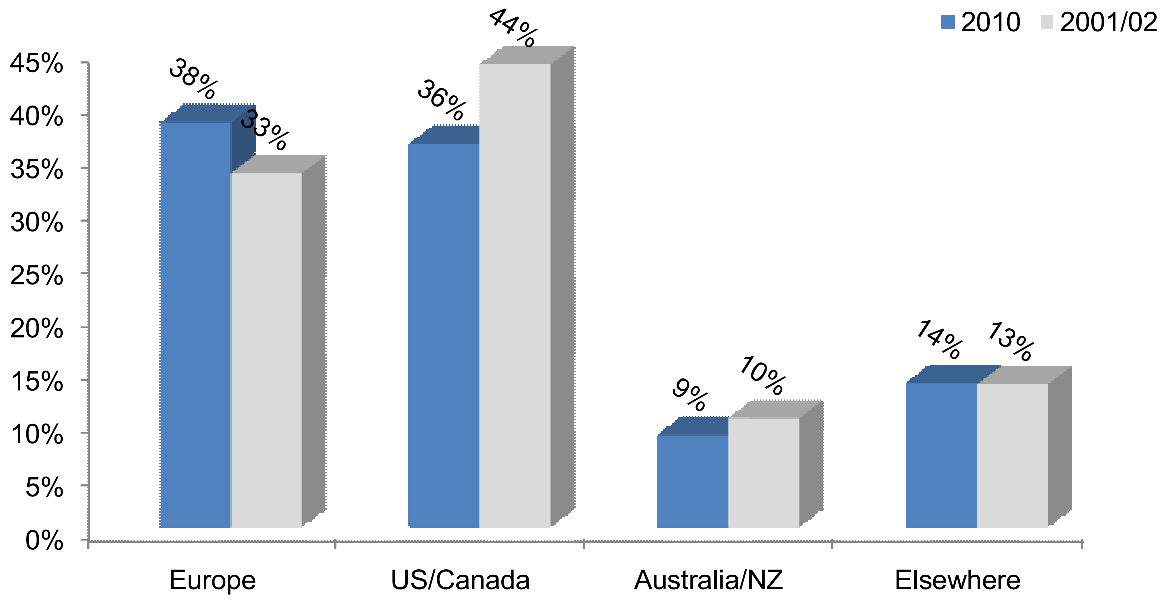
Overseas visitors were most likely to be from the United States. Other countries providing visitors during each quarter of the research were Germany, Australia, France, Canada, Spain, Poland and Italy. In all respondents represented 41 different countries during the research. The findings reflect those from other studies conducted by Scotinform which have seen a growth in European visitors in 2010.

Table 3.5: Overseas place of residence – 2010 overall and by quarter
Base = overseas respondents (449)

	2010	Q1	Q2	Q3	Q4
		Number of respondents			
United States	143	10	24	74	35
Germany	38	4	8	21	5
Australia	34	3	6	19	7
France	26	1	3	17	5
Canada	19	1	5	9	4
Poland	18	3	2	9	4
Spain	16	1	1	12	2
Ireland	15	1	-	11	3
Italy	14	1	3	9	1
Norway	14	2	-	11	1
China	10	-	2	5	3
South Africa	8	-	-	8	-
Japan	8	1	-	4	3
Bulgaria	7	-	7	-	-
India	7	1	2	2	2
Malaysia	7	-	6	-	1
Sweden	6	-	-	5	1
New Zealand	5	-	-	5	-
Mexico	3	-	-	3	-
Philippines	3	-	-	3	-
The Netherlands	3	1	1	1	-
Saudi Arabia	3	1	1	-	1
Taiwan	3	-	-	2	1
Pakistan	2	-	1	1	-
Romania	2	-	-	2	-
Portugal	2	-	-	2	-
Switzerland	2	-	-	2	-
Tunisia	1	-	-	1	-
Hungary	1	-	1	-	-
Latvia	1	-	1	-	-
Belgium	1	-	-	1	-
Slovenia	1	-	1	-	-
Denmark	1	-	-	1	-
Faroe Islands	1	-	-	1	-
Greece	1	-	-	1	-
Russia	1	-	-	1	-
Israel	1	-	-	1	-
Vietnam	1	-	-	1	-
Hong Kong	1	-	-	1	-
Egypt	1	-	-	-	1
Thailand	1	-	-	-	1

Chart 3.3 presents a breakdown of overseas visitors by region and shows that in 2010 the majority visited from Europe and the USA or Canada. This is similar to the profile of visitors residence recorded in 2001-02.

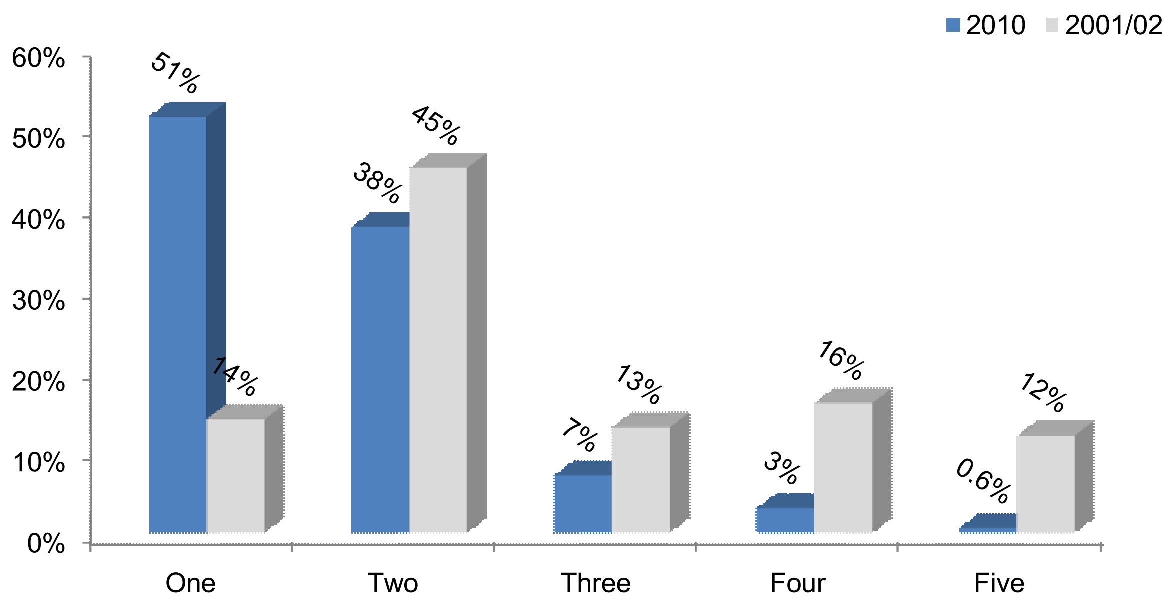
Chart 3.3: Overseas region of residence – 2010 and 2001-02
Base = 2010 (449), 2001-02 (156)



3.4 Party Size and Composition

Respondents were most likely visiting St Andrews on their own or as part of a couple with 51% of respondents visiting the city alone and 38% visiting as part of a couple. The average party size was 1.7. In 2010, visitors from the rest of the UK and overseas were more likely than Scottish residents to be visiting as a couple.

Chart 3.4: Party size - 2010 and 2001-02
Base = 2010 (1516), 2001-02 (521)



The findings from Q1 to Q4 highlight the increase in respondents visiting St Andrews on their own (30% in Q1 yet 65% in Q4) and a decrease in those visiting as part of a couple (54% in Q1 and 29% in Q4).

Table 3.6 Party size – 2010 overall and by quarter
Base = all respondents

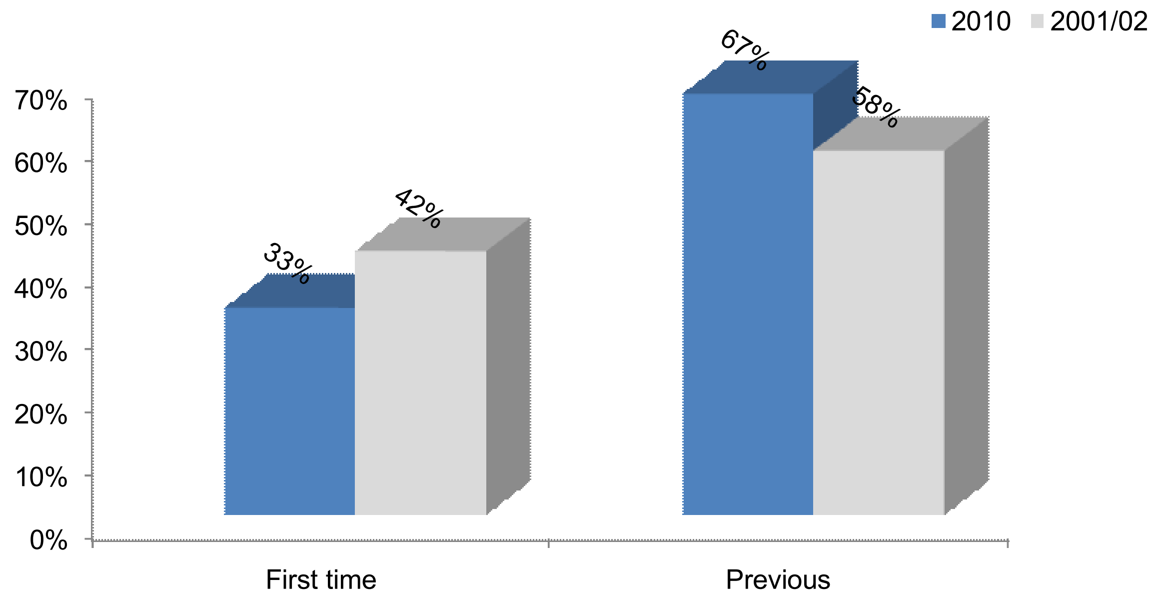
	2010	Q1	Q2	Q3	Q4
	%	%	%	%	%
One person	51	30	43	52	65
Two people	38	54	42	37	29
Three people	7	12	10	6	5
Four people	3	5	4	4	1
Five people or more	*	1	2	1	*

3.5 Frequency of Visits

In 2010 one-third of respondents (33%) were visiting St Andrews for the first time with the majority of visitors from overseas, first time visitors to the city.

Of those respondents who were repeat visitors to St Andrews, 47% had visited ten times or more in the past ten years and 6% had visited between 6-9 times. 56% of Scottish residents had visited 10+ times in the past decade and 22% of overseas visitors.

Chart 3.5: Frequency of visits – 2010 and 2001-02
Base = 2010 (1516), 2001-02 (521)



There was an increase in repeat visitors across the four quarters of 2010, with three quarters of respondents (79%) in Q4 repeat visitors to the city compared with 56% in Q1. This may be due, in part, to the poor weather in Q4 which may have influenced decisions on whether or not to travel to St Andrews.

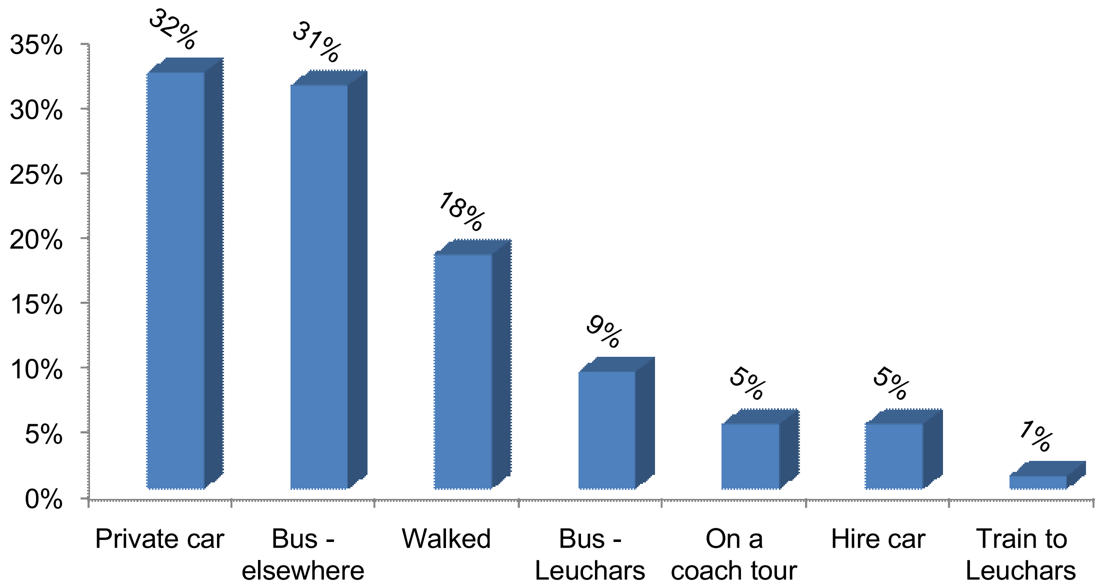
Table 3.7 Frequency of visits – 2010 overall and by quarter
Base = all respondents

	2010	Q1	Q2	Q3	Q4
	%	%	%	%	%
First time	33	43	34	36	21
Repeat visitors	67	56	65	64	79
- Twice	11	13	11	13	7
- Three times	12	22	12	12	9
- Four times	13	10	18	11	13
- Five times	9	16	11	7	8
- Six to nine times	6	6	5	5	9
- Ten times or more	47	33	42	49	53

3.6 Travelling to St Andrews

A third of respondents (32%) had travelled to St Andrews by car and a further third (31%) by bus (not from Leuchars). Very few visitors cited the train as the means by which they had reached St Andrews highlighting that the road network is the most likely transport method.

Chart 3.6: Transport to St Andrews - 2010
Base = all respondents



A clear trend since Q1 has been the decrease in the percentage of respondents travelling to St Andrews in their own car (27% in Q4 compared with 59% in Q1) and significantly more taking buses from elsewhere in Q3 and Q4 (32% and 44%) compared with 10% in Q1.

Throughout 2010, 59% of respondents from elsewhere in the UK had travelled to St Andrews in their own car suggesting that they were on a driving holiday away from home whilst 14% of overseas visitors had used a hire car. 45% of Scottish residents had used a public bus to reach St Andrews: Scottish residents were more likely than respondents from elsewhere in the UK and overseas to have travelled into the city on the bus from Leuchars.

Table 3.8 Transport to St Andrews – 2010 overall and by quarter
Base = all respondents

	2010	Q1	Q2	Q3	Q4
	%	%	%	%	%
Private car	32	59	37	25	27
Bus – from elsewhere	31	10	26	32	44
Walked	18	7	14	23	16
Bus – from Leuchars	9	7	6	10	9
On a coach tour	5	7	4	6	2
Hire car	5	7	10	3	2
Train to Leuchars	1	1	2	1	1

The quantitative findings reflect those from the qualitative research with the majority of participants travelling to St Andrews by car. Visitors from the UK and overseas were impressed by the drive to St Andrews (along the A91) which they described as "*beautiful*" and "*well kept*" and an attractive introduction to the city.

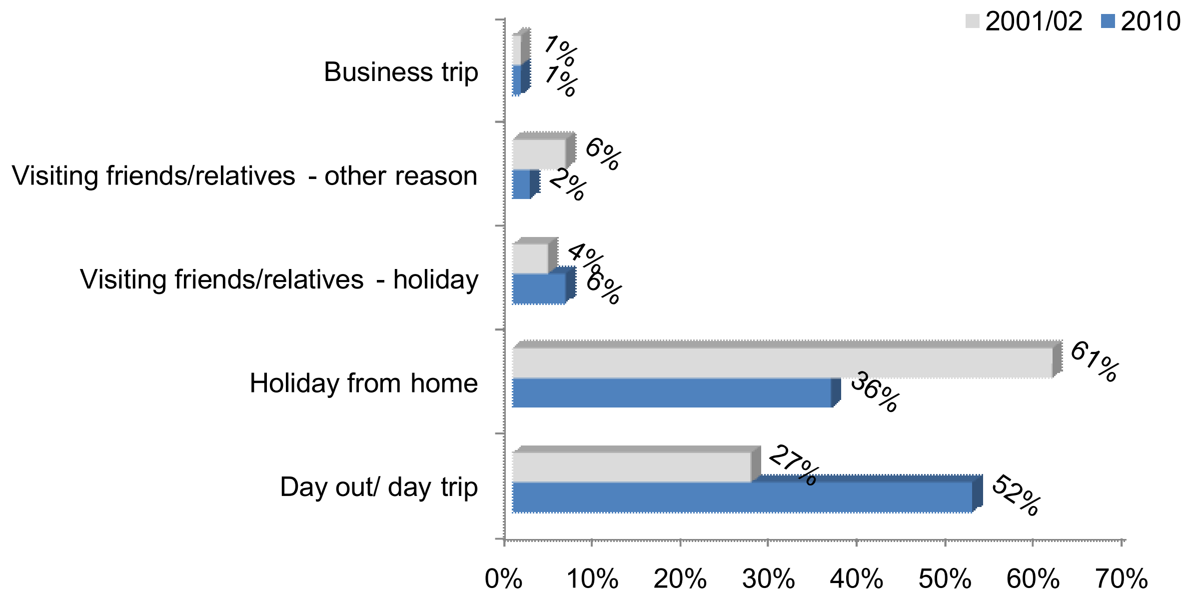
3.7 Main Purpose of Trip

Respondents were asked to select, from a prompted list, what best described the main purpose of their trip to St Andrews.

Almost half the respondents (52%) were on a day out/day trip to St Andrews on the day on which they were interviewed and almost two-fifths (36%) were on a holiday away from home.

Two thirds of first-time visitors were on a holiday from home whilst repeat visitors were most likely to be on a day out/day trip. 83% of overseas visitors were on a holiday away from home and 52% of visitors from elsewhere in the UK cited this as their main reason for being in St Andrews.

Chart 3.7: Main purpose of trip to St Andrews – 2010 and 2001-02
Base = 2010 (1516), 2001-02 (521)



Respondents were more likely to be on a holiday away from home in Q2 and Q3 over the key holiday period April-September. Those on a day out/day trip were most likely visiting towards the end of the year (October-December).

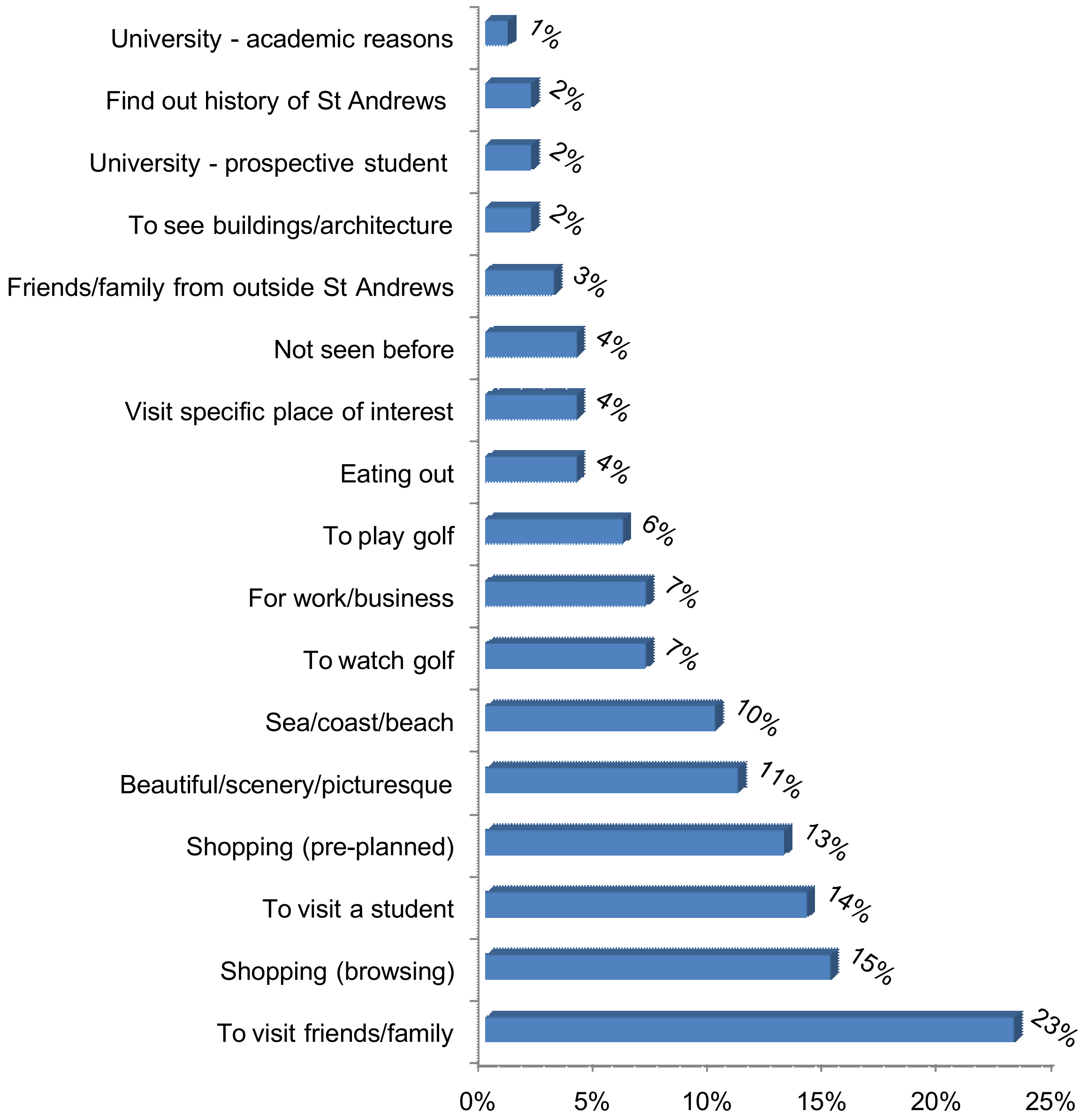
Table 3.9: Main purpose of trip to St Andrews – 2010 overall and by quarter
Base = all respondents

	2010	Q1	Q2	Q3	Q4
	%	%	%	%	%
Day out / day trip	52	47	46	50	64
Holiday from home	36	29	37	41	28
Visiting friends/relatives – holiday	6	9	3	6	5
Visiting friends/relatives – other reason	2	8	2	1	1
Shopping only	1	3	1	*	1
Business trip	1	2	2	*	1
Sporting event	*	2	-	-	-

3.8 Main Reasons for Visit

A quarter of respondents (23%) stated that the main reason for their visit to St Andrews was to visit friends/family, with 15% of respondents visiting to browse the shops and 14% to visit a student. Chart 3.8 presents the findings from this unprompted question and highlights that respondents were likely to provide more than one response.

Chart 3.8: Main reasons for visit - 2010
Base = all respondents



Whilst "*to visit friends/family*" was respondents' main reason for visiting St Andrews, the percentage of respondents citing this as a main reason has dropped since Q1 but shopping (both browsing and pre-planned) has increased since then. The decrease in outdoor activities in Q4 – beautiful/scenery/picturesque, sea/coast/beach, to watch golf – reflects the colder weather at that time.

Table 3.10 presents the findings from this unprompted question and highlights that respondents were likely to provide more than one response.

Table 3.10: Main reasons for visit - 2010 overall and by quarter
Base = all respondents

	2010	Q1	Q2	Q3	Q4
	%	%	%	%	%
To visit friends/family	23	30	26	19	26
Shopping (browsing)	15	15	15	14	18
To visit a student there	14	12	17	13	14
Shopping (pre-planned)	13	6	10	15	17
Beautiful/scenery/picturesque	11	14	10	14	6
Sea/coast/beach	10	16	12	10	4
To watch golf	7	4	6	9	4
Other	7	4	5	9	5
For work/business	7	4	6	7	8
To play golf	6	7	7	6	4
Eating out/restaurants	4	10	5	3	3
To visit specific place of interest	4	4	5	4	3
Not seen before/wanted to see it	4	9	4	4	1
Friends/family from outside St Andrews	3	5	4	3	4
To see buildings/architecture	2	1	2	2	3
University - prospective student	2	-	1	2	3
Find out the history of St Andrews	2	2	1	2	2
University - academic reasons	1	1	*	1	3
To visit the cinema	*	1	*	*	1
To watch other sport	*	-	-	*	*
To play other sport	*	-	-	*	*
To visit the theatre	*	-	-	-	*

The main motivation for participants' visits to St Andrews was to look around the town and because they had been recommended to visit by friends and family. Some participants had links with St Andrews through the University either because they or their children had studied there. Those who perceived St Andrews as a place devoted to golf were delighted that, on arrival, the city had more to offer than golf.

> *"We had no intention of visiting St Andrews but my sister said we shouldn't miss it. I'm glad we came."*

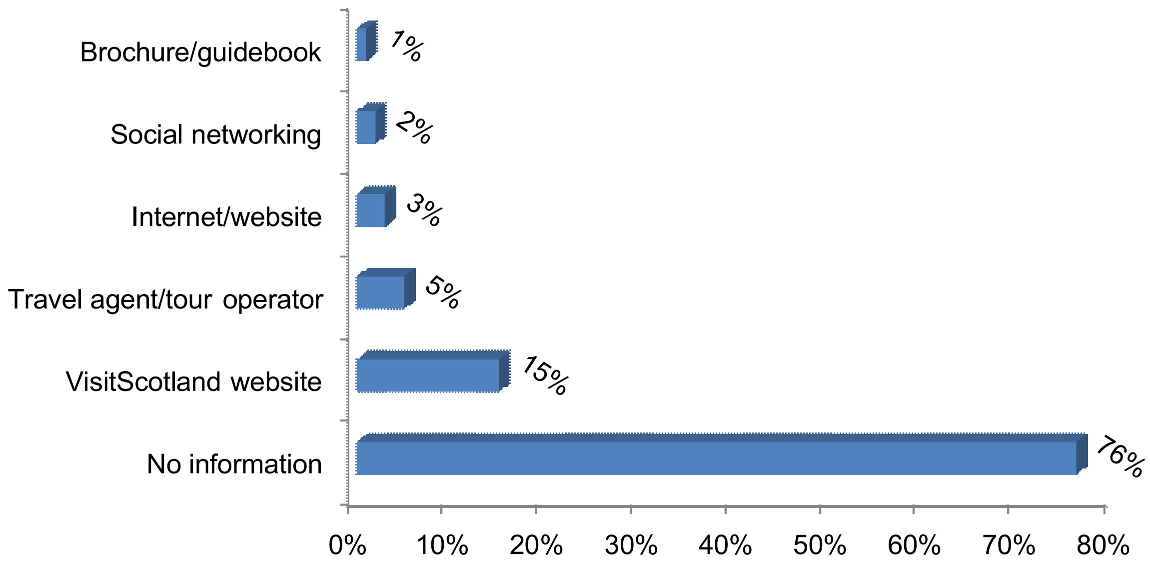
Two couples had first visited St Andrews when they brought their children to the University whilst one ex-student brought his family every year to the city for their annual two week summer break. Despite the fact that the parents of those who had attended the University approximately a decade ago, they still continued to visit the city from their home in England on a regular basis.

3.9 Information Pre-visit

The quantitative and qualitative feedback from the study has highlighted that respondents do not seek information about St Andrews prior to visiting. Interestingly, 45% of first time visitors sought no information about the city prior to visiting suggesting that they felt they knew as much as they wanted/needed to know before travelling to St Andrews.

Overseas visitors were more likely than visitors from elsewhere in the UK and Scotland to seek information about St Andrews with the VisitScotland website cited as their main source of information. 41% of overseas visitors had accessed www.visitscotland.com compared with 14% of visitors from elsewhere in the UK.

Chart 3.9: Sources of information pre-visit - 2010
Base = all respondents



In all four quarters, the majority of respondents (95%+) stated that there was nothing they would have liked to have known about St Andrews prior to their visit but were unable to find. The findings suggest that either visitors to St Andrews feel reasonably well informed about the town prior to their visit or that the St Andrews "brand" is sufficiently well known that visitors perceive that they know as much as they want/need to know prior to visiting.

Table 3.11: Sources of information pre-visit - 2010 overall and by quarter
Base = all respondents

	2010	Q1	Q2	Q3	Q4
	%	%	%	%	%
No information	76	77	79	70	82
VisitScotland website	15	8	11	18	15
Travel agent / tour operator	5	7	6	7	*
Internet/website	3	7	2	3	1
Social networking	2	3	2	2	2
Brochure/guidebook	1	1	*	2	*

A small number of respondents highlighted information needs:

- Information on places to eat and drink
- Advice on weather in the area and how to prepare
- Information on golf e.g. prices
- Other places to visit in the area e.g. historic sites
- Information about buses e.g. timetables
- Guide prices for hotels, B&Bs etc
- Information on walks and coastal routes

The findings from the qualitative research conducted with visitors mirrors those from the quantitative study with participants – whether first time or repeat visitors - unlikely to have accessed information about St Andrews prior to their visit. Repeat visitors and those with university connections with the city felt that they had sufficient knowledge prior to visiting.

First time visitors Googled "*accommodation in or near St Andrews*" to gather information for their stay. Participants were unable to recall specific websites to which their Google search had directed them but the website most likely to be recalled was VisitScotland of which participants spoke positively. Whilst a few visitors accessed Facebook and Twitter, they were unlikely to use either as a source of information about a place to visit either pre-arrival or during a visit. Social networking sites were perceived as a means of keeping in touch with friends and family rather than a source of holiday information. None of the participants were aware that St Andrews had a Facebook presence.

On arrival in St Andrews or neighbouring towns/villages many participants found that their accommodation had a host of leaflets about what was on and together with the information available at the Visitor Information Centres (in St Andrews and Anstruther) provided what they wanted to know. The majority of participants had not purchased guidebooks but those who had mentioned Lonely Planet, Rough Guide and the AA Guide Book. Most overseas visitors had done some background reading before their arrival in St Andrews but many were also content to visit the Visitor Information Centre to gain additional information on what was on/available during their stay.

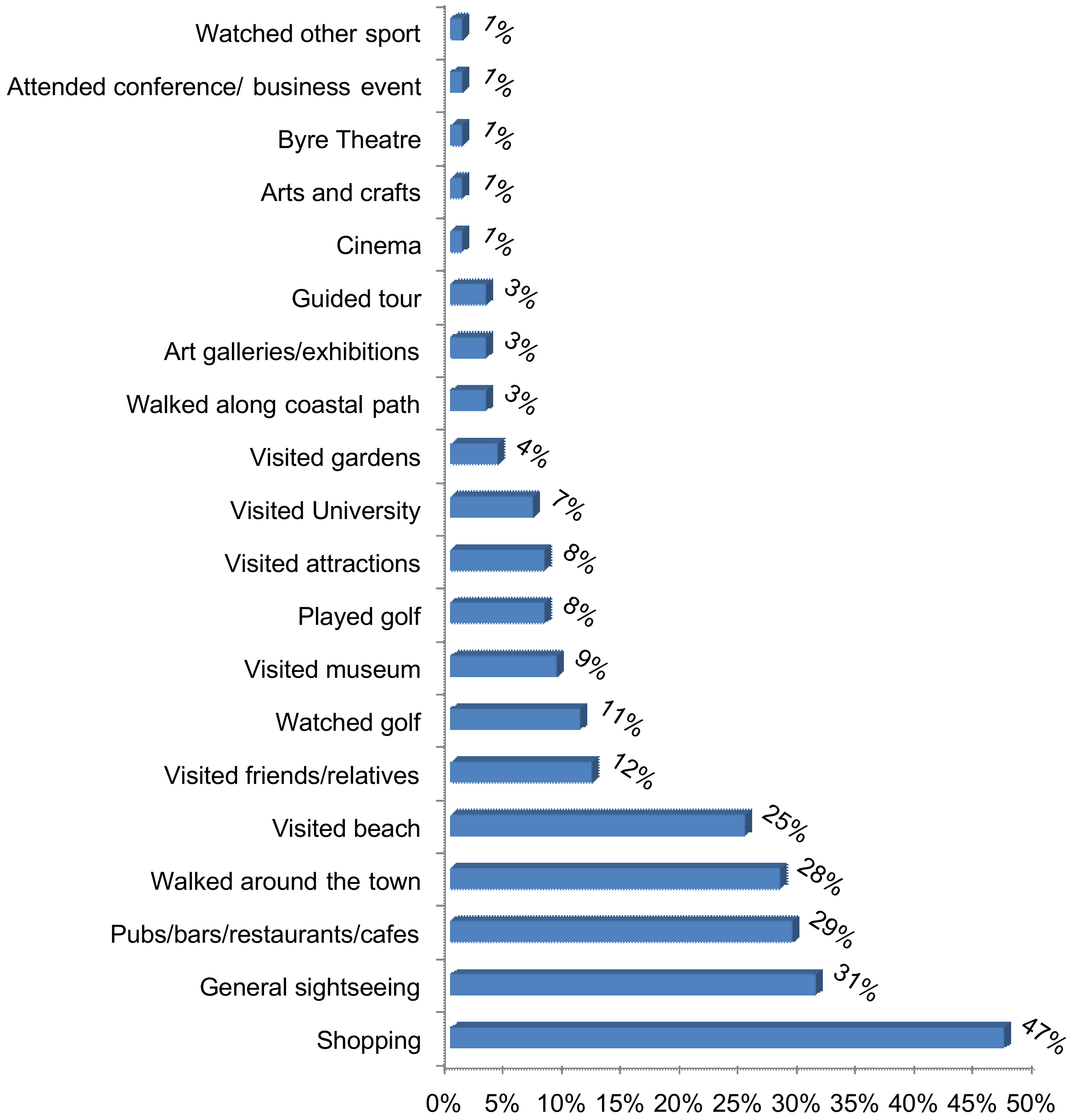
The findings from both elements of the visitor study highlight that visitors, even those visiting for the first time, were content to wait until they arrived in St Andrews before seeking additional information.

3.10 Activities Undertaken in St Andrews

Respondents were asked what activities they had undertaken thus far during their visit to St Andrews and what activities they intended to undertake during the remainder of their visit. This was an unprompted question with respondents likely to provide more than one response.

As shopping (either browsing or pre-planned) was a main reason for visiting mentioned by approximately a quarter of respondents (see Chart 3.8), it is perhaps not too surprising that the main activity undertaken by visitors to St Andrews was shopping – 47% of respondents had explored the city's retail offering during their time in the city.

Chart 3.10: Activities undertaken in St Andrews - 2010
Base = all respondents



Shopping was the main activity undertaken by respondents across all three quarters apart from Q1 when 48% of respondents stated that they had "*walked around the town*". The findings in Q4 highlight the poor weather during that time with only 8% of respondents stating that they "*walked around the town*". The findings suggest that respondents had a relaxed approach to their visit combining a number of activities including visiting eating/drinking establishments as well as general sightseeing. In Q3 there were significantly more respondents visiting the University suggesting that they were accompanying students returning to the University for the start of term.

Table 3.12: Activities undertaken in St Andrews – 2010 overall and by quarter
Base = all respondents

	2010	**Q1**	**Q2**	**Q3**	**Q4**
	%	%	%	%	%
Shopping	47	41	37	54	43
Walked around the town	28	48	29	34	8
General sightseeing	31	27	34	31	30
Pubs/bars/restaurants/cafes	29	32	27	30	28
Visited beach	25	30	33	28	11
Visited friends/relatives	12	21	14	14	2
Watched golf	11	9	13	13	6
Played golf	8	8	11	8	7
Visited museum	9	9	9	12	5
Visited attractions	8	5	11	9	5
Walked along coastal path	3	4	4	2	3
Visited gardens	4	2	7	5	3
Visited University	7	1	4	11	4
Art galleries/exhibitions	3	4	4	4	2
Cinema	1	-	2	1	1
Guided tour	3	-	3	4	3
Arts and crafts	1	4	2	1	1
Byre Theatre	1	1	*	1	2
Attended conference / business event	1	1	1	1	1
Watched other sport	1	1	*	1	-
Played other sport	*	-	1	*	*
Concert	*	-	-	*	1

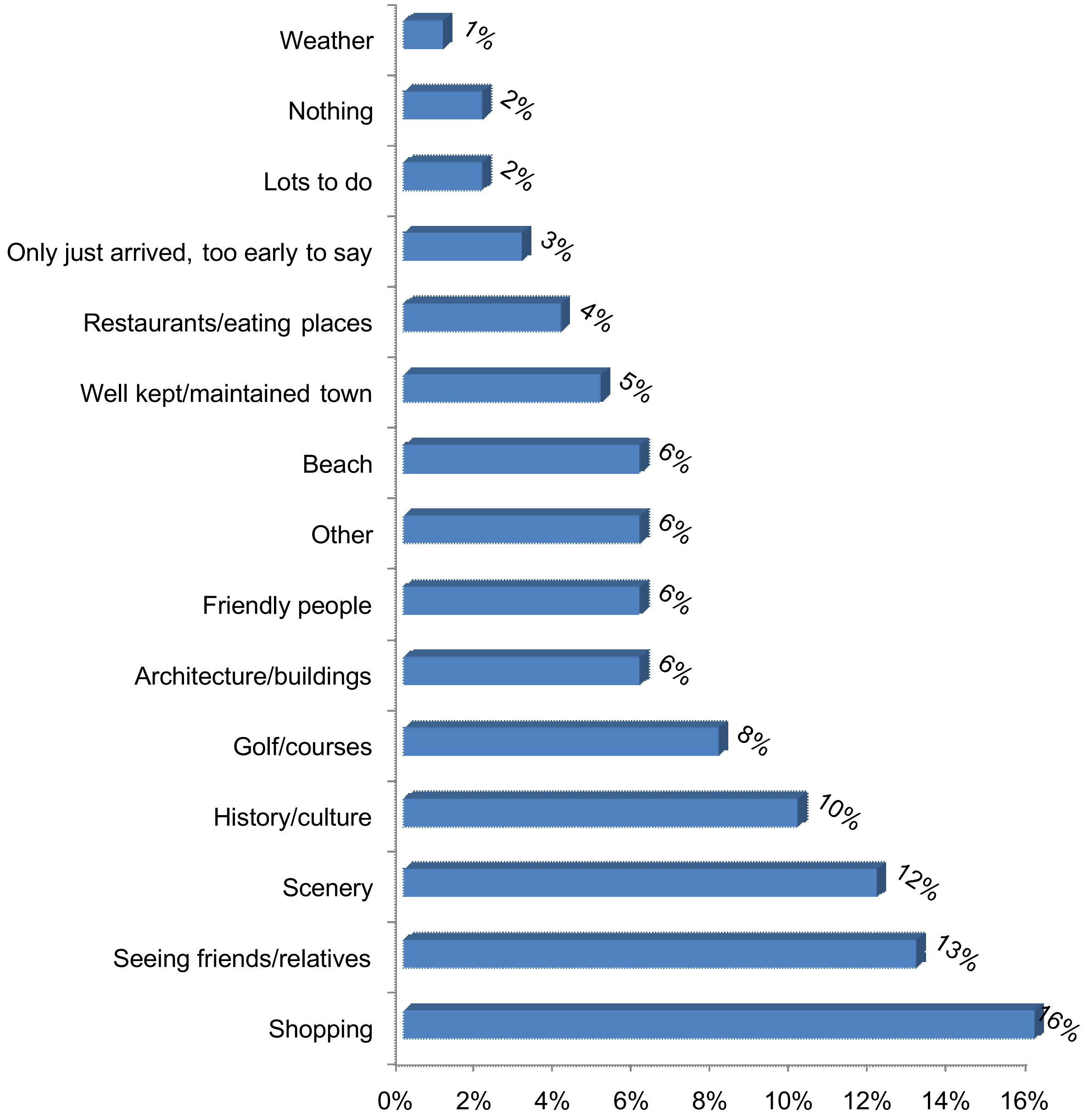
Respondents were also asked what their intentions were in terms of other activities they would undertake during their time in St Andrews.

The findings indicate that shopping, general sightseeing and visiting the beach were included in the plans that respondents had for the remainder of their time in St Andrews.

3.11 What liked Most/Least

Respondents were asked what they had most enjoyed about their visit and asked to provide just one response to this question. Shopping and seeing friends/relatives were the elements of their visit to St Andrews that respondents were most likely to have enjoyed (mentioned by 16% of respondents and 13% of respondents respectively). The scenery and history/culture associated with the town were mentioned by 12% and 10% of respondents respectively.

Chart 3.11: Most enjoyed about visit to St Andrews - 2010
Base = all respondents



The findings suggest that respondents had enjoyed the activities they had undertaken in St Andrews which were often linked to their main reason for visiting – eg shopping and visiting friends/family. The city's scenery, history/culture, golf/courses and architecture/buildings were enjoyed by respondents across the four quarters.

Table 3.13: Most enjoyed about visit to St Andrews - 2010 overall and by quarter
Base: all respondents

	2010	Q1	Q2	Q3	Q4
	%	%	%	%	%
Shopping	16	12	15	16	19
Seeing friends/relatives	13	13	17	12	14
Scenery	12	10	6	16	9
History/culture	10	11	11	10	10
Golf/courses	8	9	12	8	6
Architecture/buildings	6	8	3	6	7
Friendly people	6	9	4	5	7
Beach	6	8	6	7	1
Well kept/maintained town	5	6	4	6	3
Restaurants/eating places	4	7	6	3	4
Only just arrived, too early to say	3	2	5	1	4
Lots to do	2	3	2	3	2
Nothing	2	1	1	1	4
Weather	1	1	4	1	*
Guided tour	*	-	-	1	*
Lots for children to do	*	-	1	*	-
Parks/gardens	*	-	*	*	-
Other	6	5	3	5	10

Participants enjoyed the fact that St Andrews offered visitors a range of activities and mentioned visiting the shops, the Aquarium, the art gallery, Castle, cathedral and University area. The majority of participants were content to wander around the city at their leisure meandering through shops, stopping for refreshments, watching street theatre (taking place in July 2010), enjoying the city's architecture, etc. Participants noted that St Andrews was small enough that they could simply wander and be assured that they would see all or most of the city during their stay.

Two of St Andrews' differentiating factors were its independent shops and its coastline. The independent stores were well received by visitors who felt that this communicated that the town was prosperous. One couple, however, who were repeat visitors, noted an increase in charity shops and felt that this could lead to the town becoming "*down market*". The beach was enjoyed by participants of all ages who were pleasantly surprised that it was so accessible with car parking alongside it. The city's coastline differentiated it from other cities with some describing this as "*unique*".

The majority of respondents (82%) stated that there was “nothing” about their visit they had not enjoyed suggesting a very positive visitor experience.

Chart 3.12: Least enjoyed about visit to St Andrews - 2010
Base = all respondents

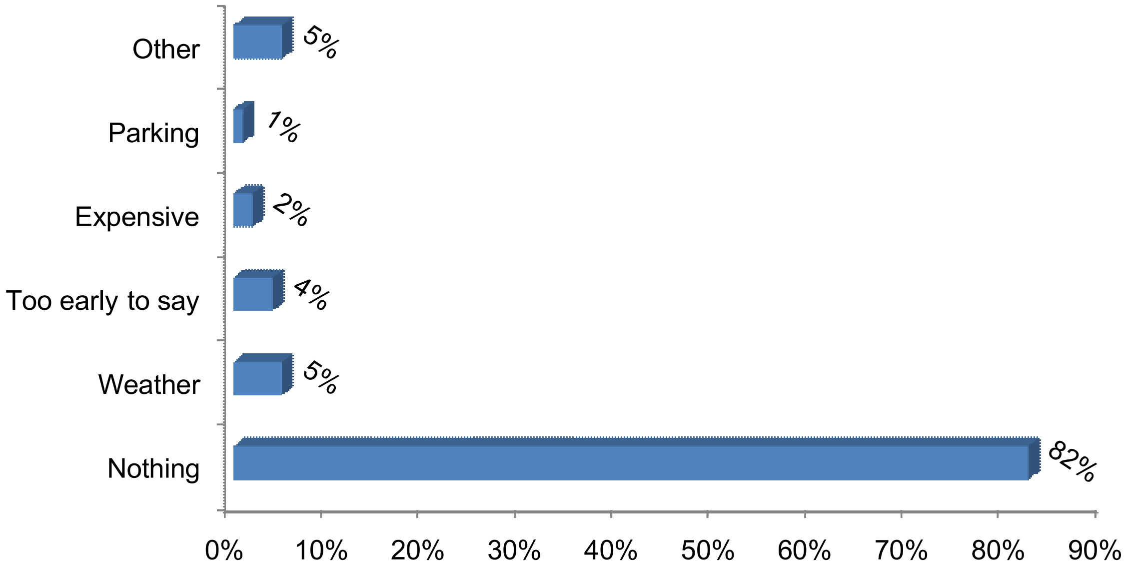


Table 3.14 highlights that across the four quarters, very few respondents cited any aspect of their visit to St Andrews that they had not enjoyed although they were more likely to mention the weather in Q1 than at any other time of the year.

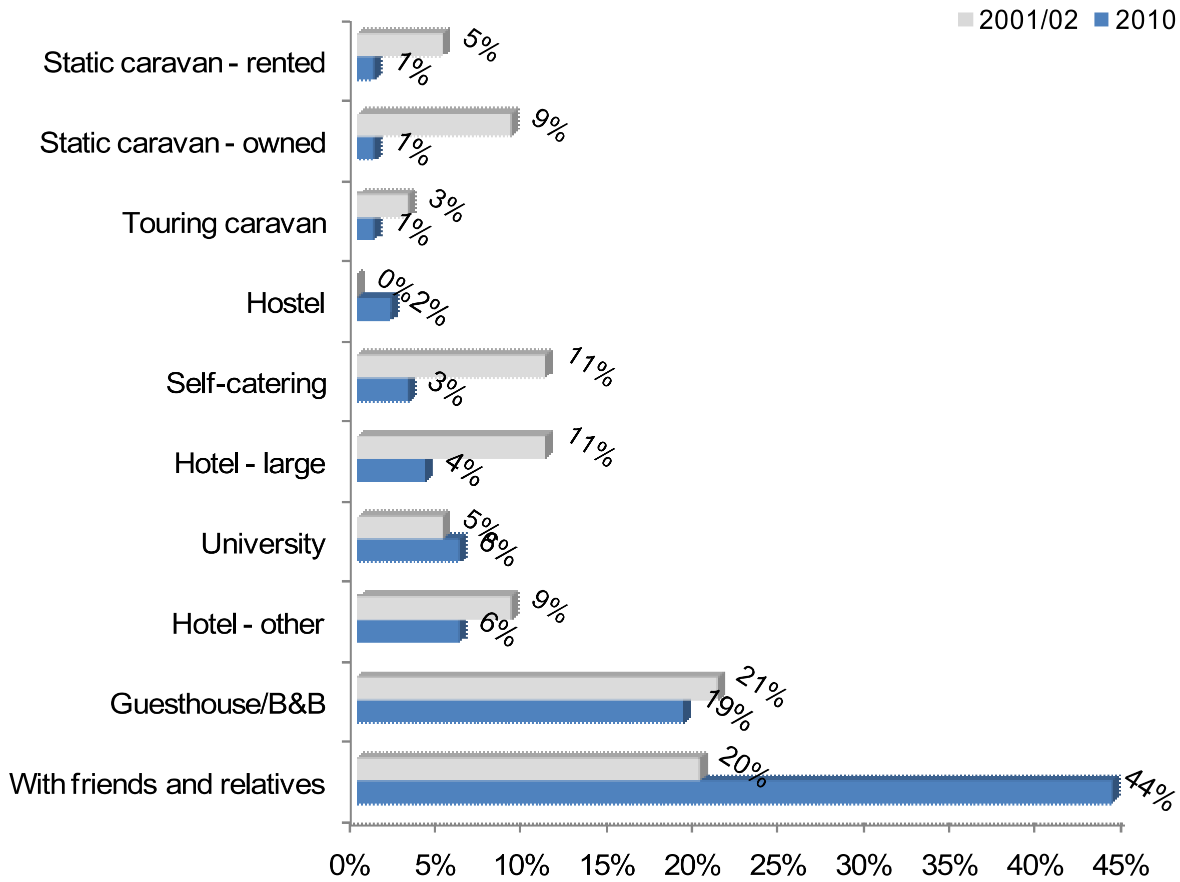
Table 3.14: Least enjoyed about visit to St Andrews - 2010 overall and by quarter
Base: all respondents

	2010	Q1	Q2	Q3	Q4
	%	%	%	%	%
Nothing	82%	75	86	83	80
Weather	5%	13	3	4	4
Other	5%	3	2	5	7
Only just arrived, too early to say	4%	3	5	4	5
Expensive	2%	1	1	2	1
Parking	1%	3	1	0	1

3.12 Accommodation during Trip

Throughout 2010, 45% of respondent trips to St Andrews involved staying away from home most likely first time visitors (81%) and overseas visitors (95%). Those staying away from home were most likely staying with friends/relatives[3] (44%) or in a guesthouse/bed and breakfast. 40% of visitors from overseas were staying with friends/relatives and 53% of visitors from elsewhere in the UK were staying with friends/relatives whilst away from home.

Chart 3.13: Types of accommodation - 2010 and 2001-02
Base = those staying overnight 2010 (683), 2001-02 (261)



The proportion of visitors staying with friends and relatives peaked in Q2 at 63% and remained the most common type of accommodation used by visitors throughout 2010. Stays at Guesthouses/B&Bs increased as the year progressed reaching 21% in Q3. Hotels accounted for 10% of all visitor accommodation in 2010.

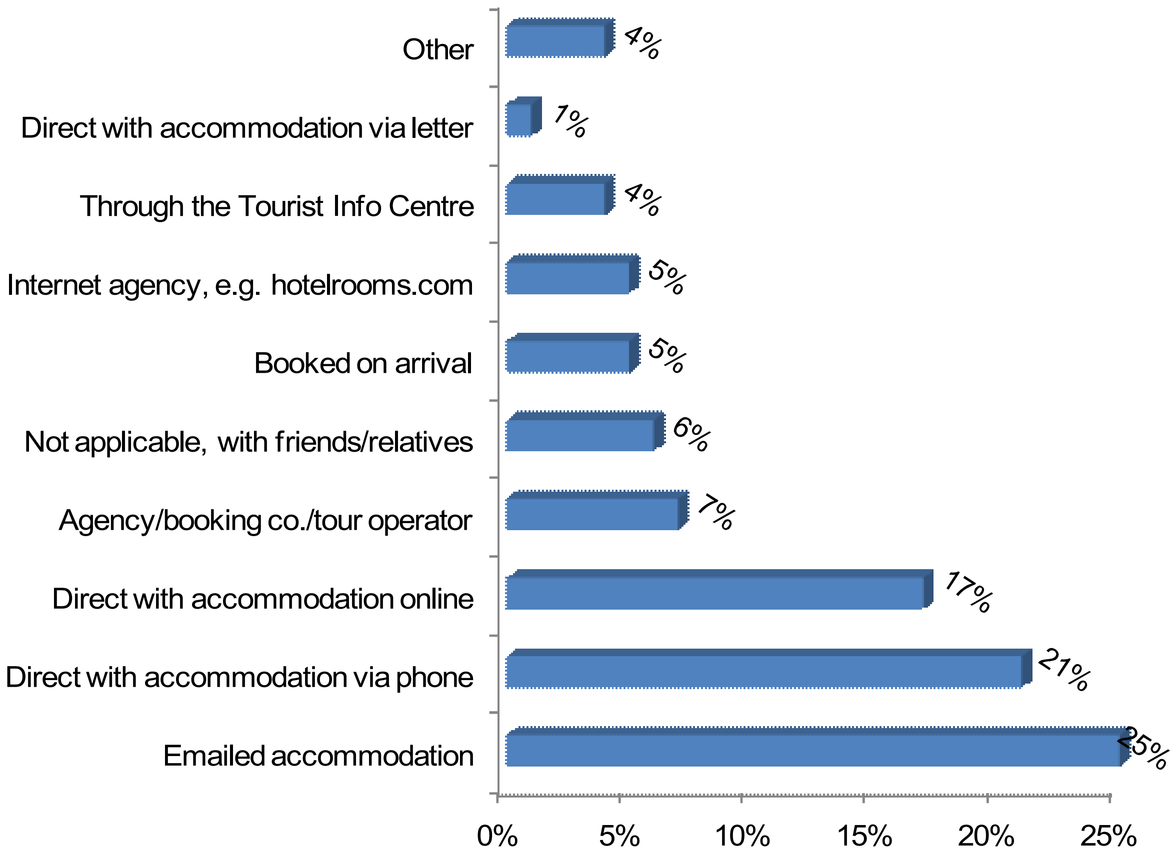
[3] VisitScotland reported that in 2009 in Fife 42% of UK tourists were staying with friends/relatives during their time spent in the area and 50% of overseas visitors were staying with friends/relatives. http://www.visitscotland.org/pdf/vs_eastern.pdf

Table 3.15: Types of accommodation – 2010 overall and by quarter
Base = those staying overnight (683)

	2010	Q1	Q2	Q3	Q4
	%	%	%	%	%
Stayed with friends and relatives	44	47	63	36	49
Guesthouse/B&B	19	5	18	21	20
I didn't stay in St Andrews	8	17	1	7	11
Hotel - other	6	4	3	6	7
University accommodation	6	-	-	8	7
Hotel - large	4	8	3	4	1
Self-catering	3	5	1	4	3
Hostel	2	1	1	3	1
Touring caravan	1	4	1	1	-
Static caravan - owned	1	1	1	1	1
Static caravan - rented	1	-	1	1	-

Those not staying with friends/family were asked how they had booked their accommodation in St Andrews. The majority of participants booked accommodation directly with the property concerned either via email (25%), via telephone (21%) or via the Internet (17%). Overseas visitors were least likely to book their accommodation on arrival although 10% of visitors from elsewhere in the UK waited until they arrived in St Andrews to seek accommodation.

Chart 3.14: How accommodation was booked - 2010
Base = those staying in booked accommodation (280)



Booking accommodation via email increased from Q1 when 23% of respondents booked accommodation in St Andrews in this way to 38% of respondents in Q4. It is interesting to note that 18% of visitors in Q2 waited until they arrived in St Andrews to book their accommodation and this included periods such as Easter and the beginning of the school holidays.

Table 3.16: How accommodation was booked – 2010 overall and by quarter
Base = those staying in booked accommodation (280)

	2010	Q1	Q2	Q3	Q4
	%	%	%	%	%
Emailed accommodation	25	23	21	22	38
Direct with accommodation via phone	21	5	12	24	25
Direct with accommodation online	17	14	21	21	5
Agency/booking co./tour operator	7	18	15	4	7
Not applicable, with friends/relatives	6	-	3	8	7
Booked on arrival	5	14	18	2	4
Internet agency, e.g. hotelrooms.com	5	9	3	5	7
Through the Tourist Info Centre	4	14	3	3	4
Other	4	-	3	6	-
Direct with accommodation via letter	1	-	-	1	-

The majority of participants staying in Fife or the local area had booked their accommodation via the Internet or telephone with some repeat visitors re-booking accommodation in which they had previously stayed. Three couples had arrived in St Andrews without booking accommodation in advance: two of these couples had visited the VIC to get advice on where to stay and had found suitable hotel accommodation whilst another couple had "*knocked on doors*" when they had seen "*vacancies*" signs in the windows of bed and breakfast establishments.

Participants were happy with the accommodation in which they were staying. One couple from Colchester who were staying in a bed and breakfast in St Andrews for three nights (£300 for the three nights) felt that the accommodation was "*excellent*" if a little expensive whilst a family from Glasgow were paying £1300 for two weeks in the town. A couple from Hampshire were delighted with the accommodation in which they were staying in Strathkinness and felt that the £350 they were paying for the week was "*extremely good value*". Another couple from Belgium had booked accommodation in the youth hostel on arrival in St Andrews that morning and felt that £11 compared well with prices they had paid elsewhere.

> *"It's a good price and better compared with other places we have stayed."*

One couple from Glasgow who were visiting the VIC to access information about self-catering accommodation in St Andrews for a holiday in the city next summer, felt that some of the self-catering accommodation advertised within brochures and newspapers was misleading. Landlords who rented out student accommodation were criticised for advertising the same accommodation outwith term time to holiday makers when it was not actually appropriate for visitors.

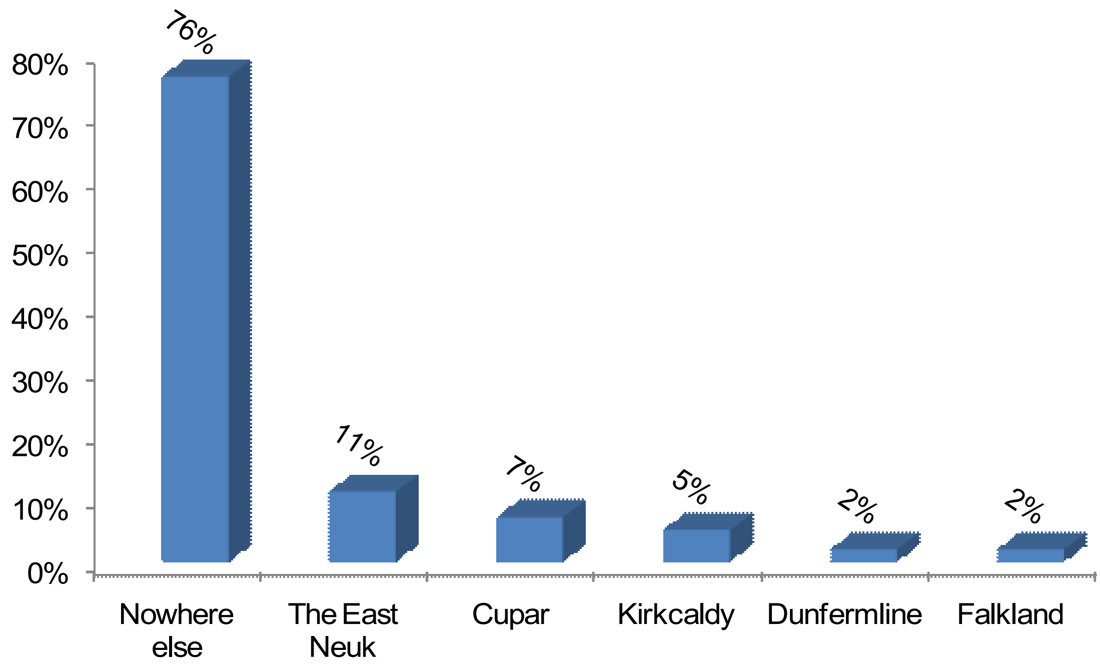
> *"We know where places are and we only want to stay in places a maximum of 1 mile from the city centre. People who don't know the area may find, on arrival, that they are located well outside St Andrews and that's not ideal for some."*

3.13 Other Places Visited

Three quarters of respondents (76%) did not visit anywhere else in Fife during their visit to St Andrews. Across 2010, the East Neuk emerged as the place most visited by people coming to St Andrews with 19% of overseas visitors spending time there.

The quarterly reports identified that first time visitors were as likely as repeat visitors not to have explored more of the area. Throughout 2010, it is interesting to note that 80% of repeat visitors (compared to 69% of first time visitors) had not been anywhere else during their stay in St Andrews. One might expect repeat visitors to explore more of the area having visited St Andrews before but the results suggest otherwise.

Chart 3.15: Where else visited in Fife - 2010
Base = all respondents



The quarterly findings suggest that respondents were more likely to visit the East Neuk in the first and third quarters and Kirkcaldy in Q1 but that overall St Andrews was the main focus for their visit.

Table 3.17: Where else visited in Fife – 2010 overall and by quarter
Base = all respondents

	2010	Q1	Q2	Q3	Q4
	%	%	%	%	%
Didn't visit anywhere else in Fife	76	65	79	73	85
The East Neuk	11	13	7	13	7
Cupar	7	8	9	8	6
Kirkcaldy	5	13	7	3	1
Dunfermline	2	5	5	1	1
Falkland	2	2	2	2	1
Other	1	3	1	1	*

3.14 Expenditure during Visit

All respondents were asked approximately how much money in total they had spent during their visit to St Andrews and were then asked to break down that total for specific elements including accommodation, shopping, etc.

The average overall spend amongst respondents in 2010 was £217.73. The average spend peaked in Q3 during the prime summer months of July, August and September. It was consistently found that Eating Out and Non-food shopping were the most common forms of expenditure though the elements generating most expenditure on average were accommodation and expenditure on golf/related items. In the 2001-02 survey accommodation also generated most expenditure on average, though no data was collected on expenditure on golf related items.

Table 3.18: Expenditure in St Andrews - 2010
Base = respondents who had expenditure during visit

Quarter	Type of expenditure	Total (£)	No. of respondents	Ave expenditure (£)
1	**Overall expenditure**	**21,660**	**162**	**133.70**
	Eating out	4,539	99	45.85
	Entertainment	3,793	26	145.88
	Accommodation	3,935	16	245.94
	Non-food shopping	3,452	59	58.51
	Golf/related items	2,785	16	174.06
	Other items	2,098	21	99.90
	Other food shopping	1,058	22	48.09
2	**Overall expenditure**	**34,064**	**207**	**164.56**
	Accommodation	7,550	30	251.67
	Eating out	6,816	101	67.49
	Non-food shopping	6,174	78	79.15
	Golf/related items	5,640	26	216.92
	Entertainment	4,975	35	142.14
	Other food shopping	2,244	41	54.73
	Other items	665	9	73.89
3	**Overall expenditure**	**173,178**	**609**	**284.36**
	Accommodation	55,973	143	391.42
	Non-food shopping	24,854	299	83.12
	Eating out	22,798	332	68.67
	Golf/related items	22,458	136	165.13
	Entertainment	18,681	172	108.61
	Other items	17,792	131	135.82
	Other food shopping	10,622	151	70.34
4	**Overall expenditure**	**52,191**	**313**	**166.74**
	Accommodation	13,715	44	311.70
	Non-food shopping	7,570	126	60.08
	Eating out	8,417	153	55.01
	Golf/related items	6,608	32	206.50
	Entertainment	5,918	65	91.05
	Other items	8,078	70	115.40
	Other food shopping	1,885	56	33.66

Table 3.19 highlights the significant difference in expenditure displayed by people from different parts of the world. Visitors from overseas and from elsewhere in the UK spend significantly more during their time in St Andrews than Scottish visitors. The main reason for the difference is because we can assume that overseas visitors are likely to spend longer in the area and be in a holiday mindset, whilst many Scottish visitors will be on day trips. This information provides evidence of the value to the St Andrews economy generated from visitors from different geographic areas.

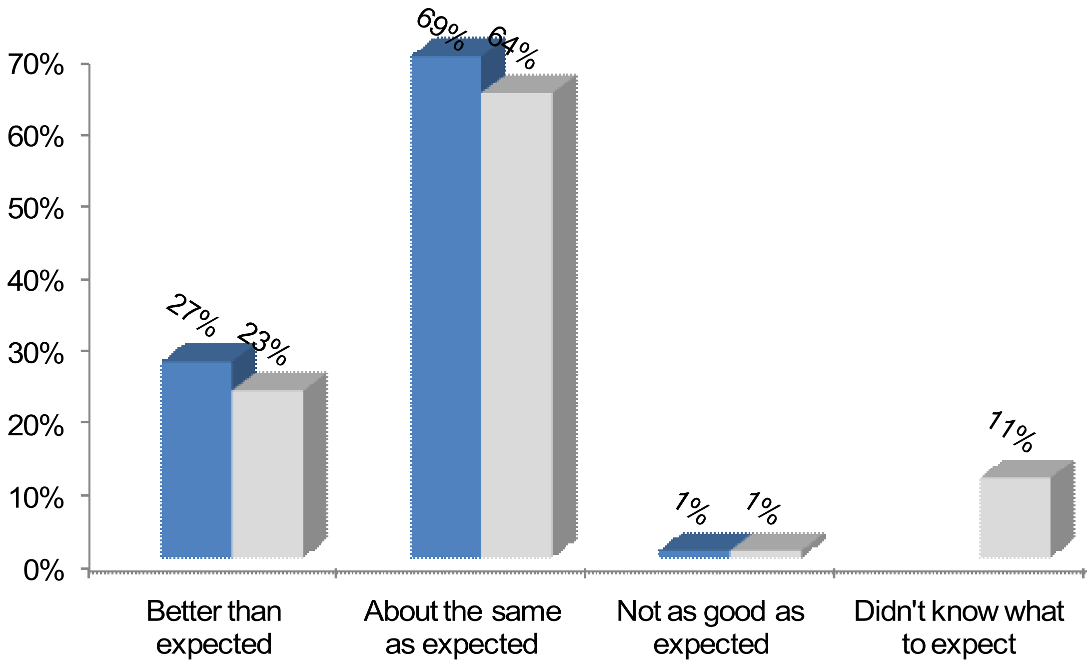
Table 3.19: Expenditure in St Andrews – 2010 by residence
Base = respondents who had expenditure during visit

Type of expenditure	Total (£)	No. of respondents	Ave expenditure (£)
Scottish visitors	46,660	738	63.22
Rest of UK visitors	36,895	162	227.75
Overseas visitors	197,238	389	507.04

3.15 Rating of Visit

A quarter of respondents stated that their visit to St Andrews was "*better than expected*" and two thirds (69%) stated that their visit was as anticipated. First-time and overseas visitors to St Andrews were much more likely than other visitors to state that their visit was "*better than expected*". 57% of first-time visitors and 56% of overseas visitors stated that their visit was "*better than expected*".

Chart 3.16: Visit compared with expectations - 2010
Base = all respondents



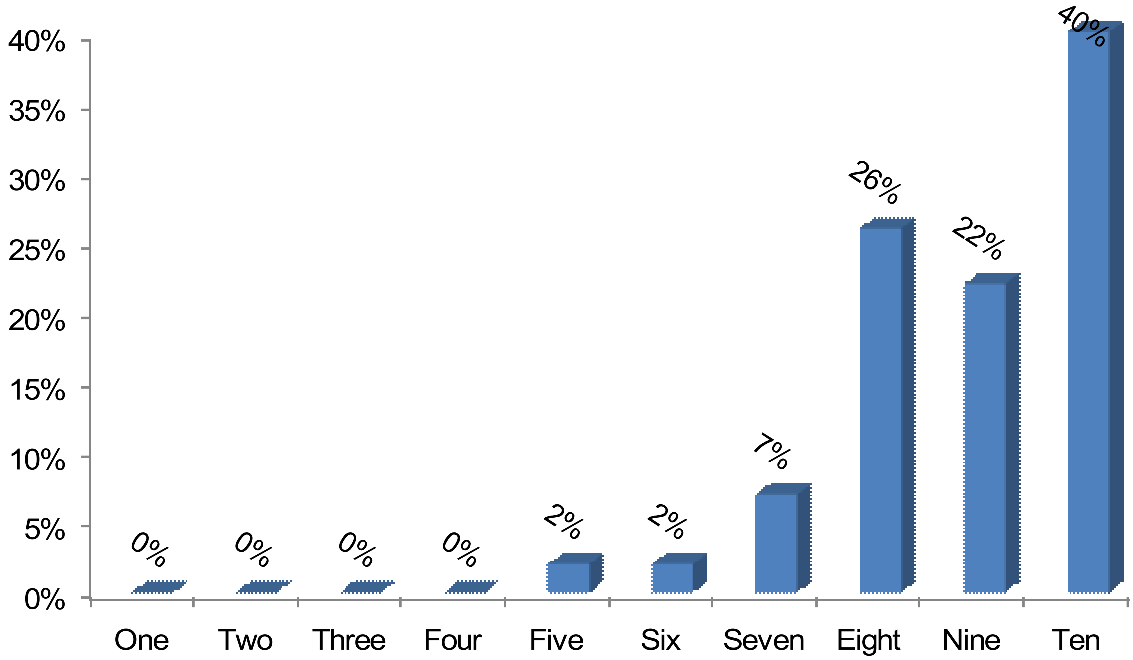
The findings in Table 3.20 report that across all quarters the majority of respondents considered that their visit to St Andrews was "*about the same as expected*" with approximately a quarter of respondents in each quarter considering that their visit was "*better than expected*".

Table 3.20: Expectations of visit to St Andrews – 2010 overall and by quarter
Base = all respondents

	2010	Q1	Q2	Q3	Q4
	%	%	%	%	%
Better than expected	27	30	26	30	22
About the same as expected	69	68	72	66	73
Not as good as expected	1	1	*	1	1
Didn't know what to expect	*	1	1	*	*

Respondents were asked to rate their **overall experience** of St Andrews on a scale of 1 to 10 with 10 being the highest. The findings throughout the four quarters of 2010 reported very high levels of satisfaction with an overall mean score of 8.84 with a high of 9.08 in Q1 and a lower, though still positive score of 8.58 in Q4.

Chart 3.17: Rating of overall experience (out of ten) - 2010
Base = all respondents



Participants were similarly satisfied with their visitor experience describing St Andrews as "*unique",* and "*offering something for everyone*".

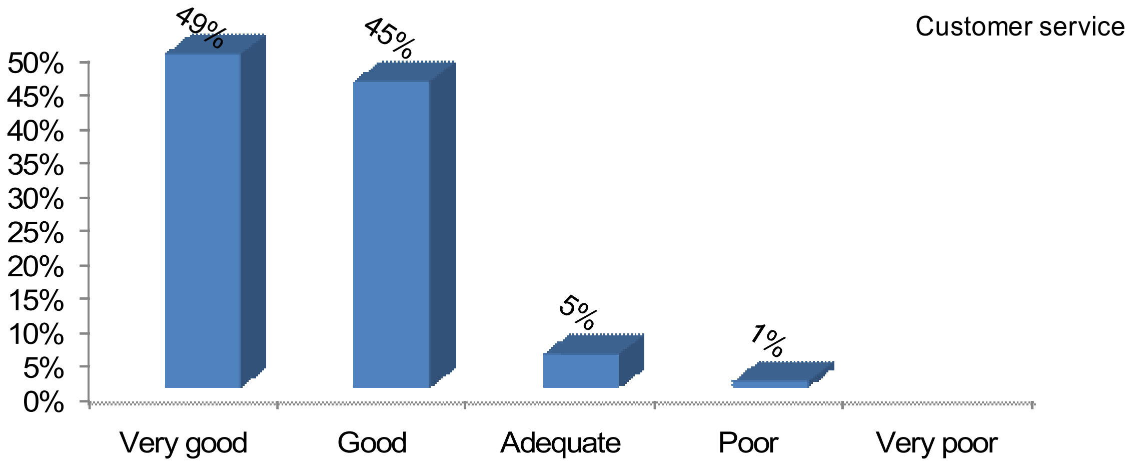
The city was compared favourably with other locations such as Oban, Fort William, Peebles, Melrose, Biggar, Norwich, Cromer, York, Devon, Cromer, Whitley Bay and Cornwall. As a university town, it compared well with locations such as Oxford.

> *"I would describe it as a mini York and Norwich – with its cathedral and different shops."*
>
> *"It's like Whitley Bay with its two parallel streets and the seaside."*
>
> *"It's got a Devon and Cornwall feel to it."*
>
> *"St Andrews is unique ... it's much more intimate than other university towns. Oxford is impersonal."*

The majority of respondents rated very highly each aspect of their visit to St Andrews with which they were prompted – customer service, quality of facilities and value for money. The findings were similar across all types of visitor (Scottish, rest of UK and overseas) and whether first time or repeat visitor. The number of respondents rating aspects as "very good" should be noted for future comparison.

Customer service in St Andrews was rated highly with 49% of respondents rating this aspect of their visit as "*very good*". Repeat visitors were more likely than first time visitors to rate customer service in St Andrews as "*very good*" and it would be hoped that good customer service is something they experience whenever they visit the city.

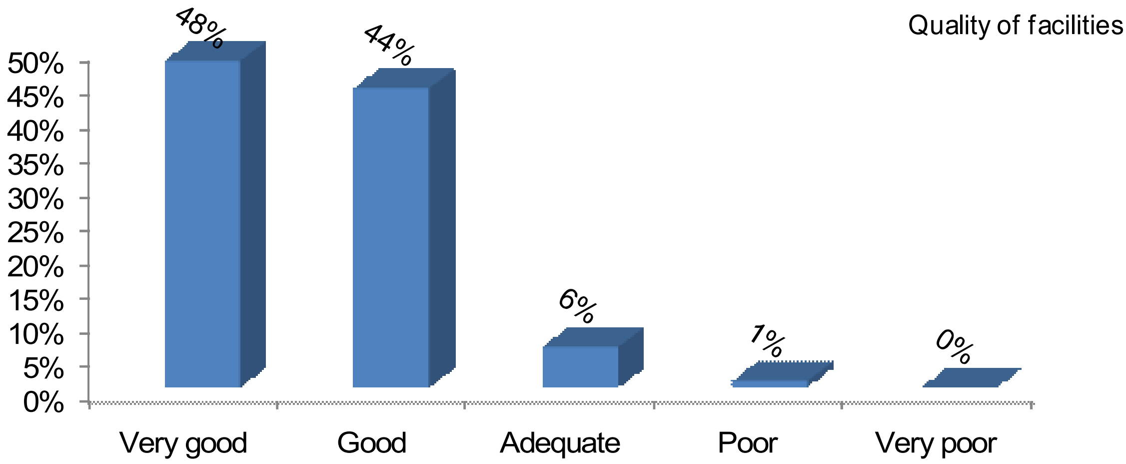
Chart 3.18: Rating of customer service - 2010
Base = all respondents



Participants praised customer service and the friendliness of staff in the local shops and restaurants with a Germany family commenting on the poor customer service in Germany and a Scottish couple stating that the staff in St Andrews' shops significantly friendlier than those in Glasgow. Staff in shops and cafes/bars were described as polite and professional whilst owners of bed and breakfast accommodation had been helpful in providing information about what to see and do in St Andrews.

The quality of facilities in St Andrews was also highly rated with 48% of respondents rating this aspect of their visit as "*very good*". 54% of overseas visitors rated the quality of facilities in the town as "very good".

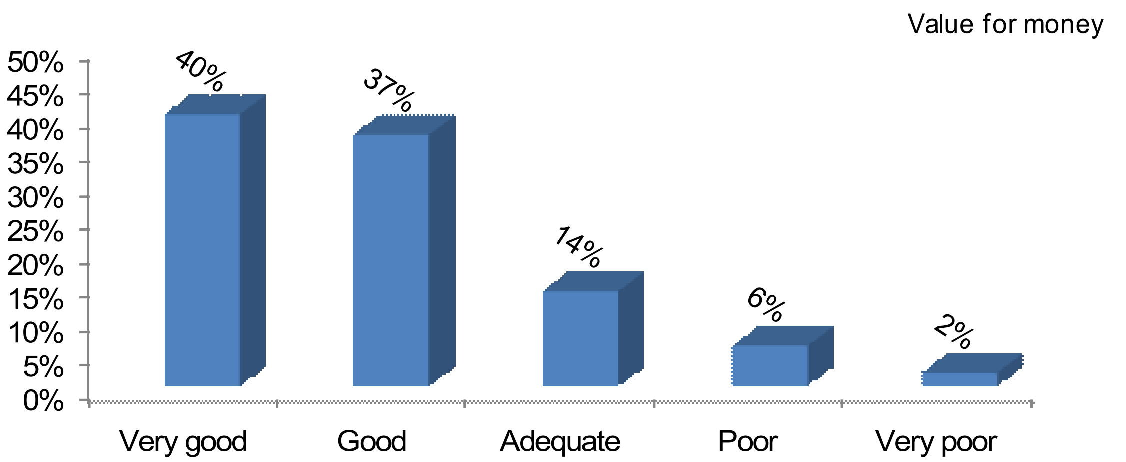
Chart 3.19: Rating of quality of facilities - 2010
Base = all respondents



Respondents rated St Andrews highly in terms of "*value for money*" with 40% considering that their visit to the city offered this. Repeat visitors and those from overseas were more likely than first time visitors and those from Scotland and elsewhere in the UK to rate the town as "*very good*" for value for money.

Of note, 8% of visitors felt the value for money they had experienced in St Andrews was poor or very poor. This is the one area from these ratings that may be a cause for concern and should be monitored.

Chart 3.20: Rating of value for money - 2010
Base = all respondents



3.16 Improvements to Visit
The questionnaire featured an open-ended question asking respondents how their visit to St Andrews could have been improved on. Throughout the study, key themes have emerged within these responses as detailed below.

- The quality/range of shops available

  "Not a lot of shops, need more larger shops."

  "Lower prices in shops and more child friendly with buggies."

- Pricing/costing within the shops/bars/restaurants – e.g. high

  "If they were less expensive, the prices are very high for everything."

  "Lower Prices."

- The weather

  "It isn't as nice weather as I hoped."

  "Weather could be improved."

- More/better parking facilities

  "Parking in the centre of town. More disabled places in town when I brought my elderly parents it was a nightmare."

  "Parking can be a bit pushed and expensive if you want to spend a full day here."

- Eating – wider range of options

  "More reasonable cafes and restaurants etc."

  "More eating places to get family meals."

- More/better value accommodation

  "Hotels are too expensive to stay overnight even the B&B's are expensive so we don't stay overnight."

  "More hotels to choose from."

- Signage – to guide people around the city

  "Better posting for shops, can't find what we're looking for."

  "A few more direction signs and map/visitor signs to make it easy to get about."

- Easier/quicker access from Leuchars/transport related

"Better connection from here to Leuchars train station."

"Train station would make it easier to travel here."

"Direct train from Aberdeen to St Andrews."

- More for children/young people to do

"More things for children to do play centre etc."

"More sport activities for teenagers."

The majority of participants were unable to suggest any way in which their visitor experience could have been improved although one family criticised the city's leisure centre. Suggestions arising from mini groups with visitors included:

- Signage highlighting the way to the beach, shops, castle etc
- Walking tours with the opportunity to hear about the city's history
- Developments at the harbour to include bars/restaurants

The St Andrews Partnership asked Scotinform to explore, within the mini groups, visitors' views on the introduction of a cycling initiative in the city. This proposal was very positively received by visitors, particularly overseas visitors (eg from Holland and Germany) who were accustomed to cycling on a daily basis and with families who enjoyed cycling at home as well as on holiday.

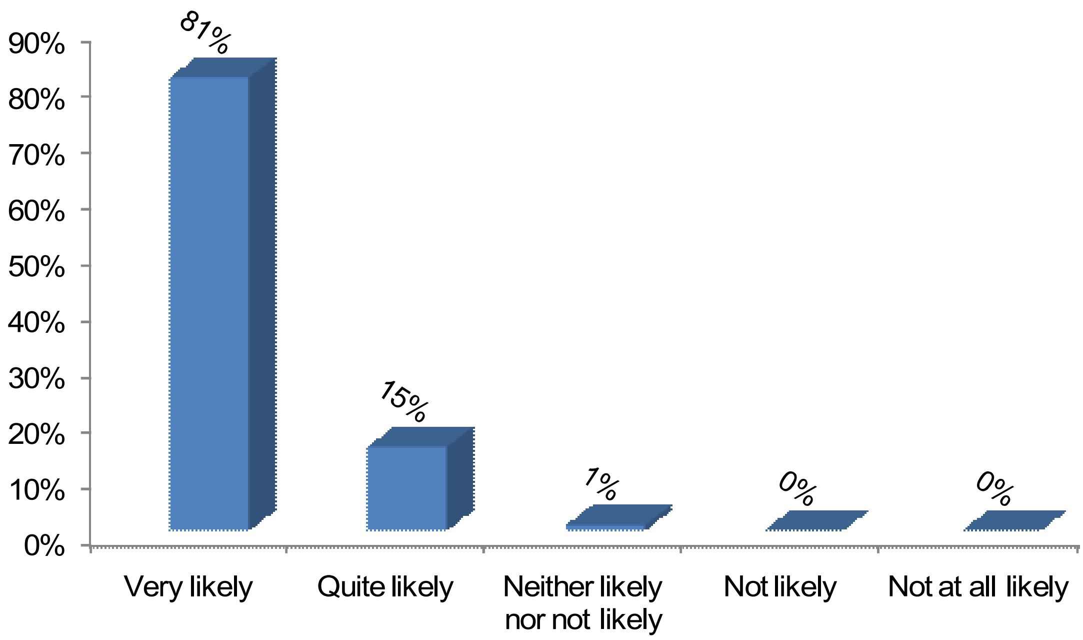
3.17 Likelihood of returning to St Andrews

Respondents' positive visitor experience was demonstrated in 81% of respondents who stated that they were "*very likely"* to return to St Andrews. Of particular note is:

- 72% of first time visitors and 86% of repeat visitors stated they were "*very likely*" to return

- 74% of overseas visitors and 79% of other UK visitors stated that they were "*very likely*" to return – highlighting St Andrews appeal to visitors from not only the UK but from a variety of countries overseas.

Chart 3.21: Likelihood of returning to St Andrews – 2010
Base = all respondents



Participants stated that they would return to St Andrews if the opportunity arose. For some participants, a visit to St Andrews was an annual event – this might be for a long-weekend, week-long visit or a two week holiday, often in the same accommodation each year.

St Andrews emits a sense of peace and tranquillity to visitors which appeals to all ages with one participant describing St Andrews' visitors as "*sophisticated travellers ... and that's the way you should keep it*".

3.18 Response to Attitude Statements

The questionnaire featured a series of attitude statements with respondents asked to state whether they agreed or disagreed with each of them. The statements covered ease of navigation around the city, car parking, booking a game of golf and St Andrews being described as well looked after and welcoming.

Overall, the 2010 findings include:

- 67% of respondents "*agreed strongly*" that "*St Andrews is a place that is well looked after*" with first time visitors and overseas visitors particularly likely to "*agree strongly*" with this statement.
- Navigating around the town appears not to have posed problems for respondents with two-thirds (65%) agreeing strongly with the statement "*I found it easy to find my way around the town*"
- 62% of respondents "*agreed strongly*" that "*St Andrews is a welcoming place*" with 66% of first time visitors and 73% of overseas visitors agreeing strongly with this statement
- In the main respondents agreed that they had had "*good value for money in St Andrews"* with 57% agreeing strongly with this statement and a further 29% agreeing.
- Over a quarter of respondents (26%) agreed strongly with the statement "*I am happy with the car parking arrangements in the town*" but 5% disagreed and 7% strongly disagreed with this statement suggesting there are issues.
- For those who chose to play golf whilst visiting St Andrews, the findings suggest that they had little problem in booking a round of golf when in the town.

Table 3.21: Response to attitude statements - 2010
Base = all respondents

	Agree strongly	Agree	Neither/ nor	Disagree	Disagree strongly	N/A / Don't know
	%	%	%	%	%	%
St Andrews is a place that is well looked after	67	30	1	1	*	1
I found it easy to find my way around the town	65	31	2	1	*	1
St Andrews is a welcoming place	62	34	3	*	*	1
Overall, I have had good value for money in St Andrews	57	29	7	3	1	3
I am happy with the car parking arrangements in the town	26	17	8	5	7	37
It has been easy to book to play golf on the golf courses in St Andrews	17	10	3	1	2	66

Participants who had travelled to St Andrews via car and were staying in the town, had found parking relatively easy. For them a key attraction of their holiday was the fact that they had not had to go back to their car since they arrived because everything they wanted to see and do was within walking distance.

3.19 Marketing St Andrews

Participants considered that St Andrews appealed to:

- The golf market – visitors from the UK and overseas
- Families who enjoyed access to the beach
- Older people who enjoyed a peaceful place with access to walking, the sea and shops

The mini group discussions highlighted that St Andrews key strength was that it had more to offer than golf and a University. For many first time visitors this came as a surprise and the emphasis on golf had previously been a barrier to visiting the city. They felt quite strongly that St Andrews should promote other aspects such as its historical connections, the walks and beaches, activities for young people and families, and the quality of bars and restaurants. Participants felt that the opportunity existed to promote St Andrews as more than a place associated with golf and suggested the following statements:

> *"It's not just a golf town."*
>
> *"There's lots of good food and you can walk everywhere. There are nice shops too."*
>
> *"It's a bit different."*
>
> *"It has everything without being too big."*
>
> *"All round attractions – great beaches, University, history as well as the golf."*
>
> *"There is great history and stories to be told about St Andrews."*

They were also keen that the city did not change "too much" as it had so much to offer the way it is.

> *"It's a seaside town without the amusement arcades. Don't go changing it."*
>
> *"It's not commercialised like other seaside towns."*

4. SUMMARY AND CONCLUSIONS

4.1 Visitor Profile

- Throughout 2010 information was collected from 1,516 respondents and 2,578 visitors providing the St Andrews Partnership with robust data to inform the future development of the city including facilities/activities and marketing.

- The study highlighted that visitors were more likely to be female, all age groups were well represented except the under 16s, one fifth of respondents were from the AB socio economic group and approximately half were in employment.

- Approximately two-thirds of visitors were in St Andrews for the first time, highlighting the high proportion of repeat visitors for whom the city is an appealing visitor destination.

- Overall, the largest proportion of visitors came from Scotland with 13% from elsewhere in the UK and approximately a third from overseas. Visitors from Scotland were most likely repeat visitors although a fifth of overseas visitors had been to St Andrews ten times or more in the past decade. Some of the participants in the mini groups had links with St Andrews through the University and repeatedly visited the city as they felt it had so much to offer. Interestingly, this view was shared by those visiting with pre-school children as well as retired couples highlighting St Andrews' ability to offer something for everyone.

4.2 Seeking information pre-visit

- The quantitative and qualitative research highlighted that visitors were unlikely to have looked at information about St Andrews before they visited. Amongst those who did look up information, the VisitScotland website was more likely to have been accessed than any other website. First time visitors who had taken part in the qualitative research had consulted guide books including Lonely Planet, Rough Guide and the AA Guidebook. The Visitor Information Centre in St Andrews and towns/cities in the local areas were sources of information for visitors about what to see and do once they had arrived. Respondents and participants agreed that there was nothing they would have liked to have known about St Andrews prior to their visit but were unable to find. It should be noted that the St Andrews website www.standrews.co.uk, which is the official portal for the city, had not been up and running until the latter stages of this study.

4.3 Reasons for visiting St Andrews

- Approximately half the respondents were on a day out/trip on the day on which they were interviewed and a further third were on a holiday away from home. A key reason for visiting St Andrews was to visit friends/family mentioned by approximately one quarter of respondents. Whatever the key motivation for visiting, the findings highlight that respondents and participants undertook more than one activity in the city (although almost half had enjoyed shopping) demonstrating the range of activities offered to visitors.

4.4 Accommodation in St Andrews

- The main type of accommodation used by respondents whose visit to St Andrews included a night or nights away from home, were the homes of friends and relatives. One fifth of respondents, however, stayed in guesthouses/B&Bs and 10% in hotels. The majority of respondents and participants booked their paid-for accommodation directly with the property either via email, telephone or the Internet. It is surprising to note the number of respondents who did not pay for overnight accommodation but these findings are in keeping with those from VisitScotland's tourist statistics for the wider Fife area.

4.5 Visiting elsewhere in Fife

- Three quarters of respondents did not visit anywhere else in Fife during their visit to St Andrews suggesting that it was the key focus for their visit to the area. This is surprising given the easy access to East Neuk and towns including Cupar, Kirkcaldy and Dunfermline but suggests that collaborative marketing across the area may encourage people to stay longer and experience all that Fife has to offer.

4.6 Visitor spend

- The average spend amongst visitors was £217.73 although average spend increased during the summer period (July-September) to £284.36. Eating out and non-food shopping were the most common forms of expenditure although the elements generating most expenditure on average were accommodation and expenditure on golf/related items. Visitors from outwith Scotland spend significantly more than Scots during their time in St Andrews with overseas residents spending on average £507.04 during their stay and other UK residents £227.75. This information provides evidence of the value to the St Andrews economy generated by visitors from different places of residence.

4.7 The visitor experience

- Respondents most enjoyed the shopping offered by St Andrews, seeing friends/family, scenery, history and culture. Participants agreed that the city had much to offer visitors and commented on the seaside, the university, the city's history, golf and the fact that there were so many independent unique shops setting it apart from other visitor destinations. These are all very positive attributes which should feature in any marketing activity to demonstrate all that the city offers its visitors.

- Given respondents and participants' positive visitor experiences it is perhaps not too surprising that 82% of respondents stated that there was nothing they disliked about St Andrews. Dislikes mentioned by the minority of respondents included the weather which was the only aspect mentioned by 5% of respondents. Parking and signage were also mentioned with some participants having problems finding parking spaces whilst others felt that the lack of signage in the city meant they did not find navigating the city and its sights as straightforward as they would have wished.

- A quarter of respondents rated their visit to St Andrews as "*better than expected*" with first time and overseas visitors most likely to rate is as exceeding their expectations. There were very high levels of satisfaction throughout the four quarters of 2010 with an overall mean score of 8.84 (respondents rated their visit out of 10). Participants were similarly very satisfied with their visit highlighting St Andrews as a very successful visitor destination.

- Customer service and quality of facilities in St Andrews were rated very highly by respondents, a view shared by respondents who compared St Andrews very positively with other visitor destinations in terms of customer service and quality of service. Value for money in St Andrews was less likely to be rated as "*very good*" by respondents and something which local businesses should ensure they strive to offer all visitors.

- The questionnaire featured a series of attitude statements with respondents asked to rate whether they agreed or disagreed with each. The statements covered ease of navigation around the city, car parking, booking a game of golf and St Andrews being described as well looked after and welcoming. There were very high ratings of agreement across all statements with the majority stating that they "*agreed strongly*" with the statements with which they were prompted. Findings included:

    - Two thirds of respondents agreeing strongly that "*St Andrews is a place that is well looked after*", it is "*easy to find my way around town*", and "*St Andrews is a welcoming place*"
    - 57% agreeing strongly with "*I have had good value for money in St Andrews*"
    - Approximately a quarter of respondents agreeing strongly with "*I am happy with the car parking arrangements in the town*"

- Respondents positive visitor experience was further demonstrated with 81% stating that they were "*very likely*" to return to St Andrews including 72% of first time visitors and 74% of overseas visitors. Participants shared this positivity and highlighted that the city emitted a sense of peace and tranquillity which appealed to all ages.

4.8 Marketing St Andrews

- The discussions highlighted that St Andrews' unique selling proposition is its uniqueness making it difficult to compare with other university towns, other seaside locations, etc. The opportunity exists for the St Andrews Partnership and local businesses to identify key visitor segments and market to them directly offerings which meet their needs, eg family holidays with seaside location (no amusement arcades) and indoor and outdoor activities (eg the Aquarium and the Castle).

- Participants visiting St Andrews for the first time associated the city with golf and the university. Whilst for many, golf was not the main reason for their visit, media coverage had proved to be a key means of communicating St Andrews' coastline and other attributes. For those who had an interest in golf, there was surprise and delight that world class golf courses were so accessible. There is potential, therefore, for the city to communicate that its golf courses are accessible and that there are several courses from which they can choose to play.

- The St Andrews portal www.standrews.co.uk went live during the course of the 2010 research. A challenge for the St Andrews Partnership and local businesses is to ensure that the website fully communicates the range of activities/facilities St Andrews offers all visitor segments. Whilst visitors feel they don't need to find out about St Andrews before they arrive, there may be potential visitors who choose not to visit St Andrews because the associations with golf and the university are not sufficiently attractive but they are unaware of what else St Andrews can offer. Feedback from respondents and participants who were repeat visitors suggests that the city offers a range of activities in a unique setting and it is this message which should be communicated through marketing activity to those who have yet to experience St Andrews.

- Given that so many visitors stay with friends and family rather than in paid-for accommodation, there is a challenge for the St Andrews Partnership to ensure that local residents become positive ambassadors for the city ensuring that their visitors are fully aware of what the city has to offer and that they are not "*missing out*" on any marketing messages which may be communicated by more formal routes.

- It is clear that St Andrews is a destination which for many acts as a magnet with respondents and participants revisiting on a regular basis. The challenge is to ensure that the city does not change too much that it becomes less familiar to them and makes them question whether they should return.

5. ACTION PLAN

The following are key tasks identified from the research findings:

- Disseminate findings of research to as many local businesses as possible and invite further feedback

- Encourage collaboration amongst local businesses to share best practice, visitor information and create alliances which offer added value to the visitor, e.g. free glass of wine at a restaurant if staying at local guesthouse/B&B

- Ensure the city has the fundamentals in place which are expected by visitors (e.g. signage, public toilets, parking, etc)

- Identify key visitor segments and what St Andrews currently offers each segment and could potentially offer each segment

- Create key message specifically targeted to visitor segments and ensure that all parties (including local businesses) use these in marketing activity

- Ensure www.standrews.co.uk communicates key activities/facilities in St Andrews and includes key messages relevant to visitor segments. Ensure traffic is driven to the site through search engines

- Keep local residents abreast of findings, developments and key marketing themes so they too communicate these to friends and family who may be staying with them

- Use these findings as a benchmark for future research activity and to measure levels of satisfaction with any changes made

Appendix 1: Comparison with other places

Reference to previous and published research allows a comparison of results from the St Andrews visitor survey data and other visitor surveys.

Methodological details of these other surveys can be found after the discussion of the tables below.

Age profile
Compared to visitors to Stirling the age profile of St Andrews visitors is quite similar. The strength of St Andrews is that it seems to appeal to all age groups, whereas the Stirling data highlights a smaller number of visitors aged 65 years+

Table A: Age profile of visitors

	St Andrews	**Stirling**
	%	%
Under 16	7	n/a
16-24	21	11
25-34	12	22
35-44	16	22
45-54	17	22
55-64	12	17
65+	16	5

Place of residence
The results for St Andrews compare well with Stratford and Windsor – in all these locations between 24% and 33% of visitors were from overseas. The outlying figures come from Stirling where it was found that 55% of visitors in 2010 were from overseas. This is very high for a UK location.

Table B: Place of residence

	St Andrews	**Stirling**	**Stratford**	**Windsor**
	%	%	%	%
UK	70	45	76	67
Overseas	30	55	24	33

Method of transport
In all four locations car and bus are the main forms of transport. Local variations e.g. existence of a train station, will affect some of these figures.

Table C: Method of transport

	St Andrews	**Stirling**	**Stratford**	**Windsor**
	%	%	%	%
Car	32	46	65	51
Bus	40	-	20	32
Train	1	11	6	24
Coach	5	-	5	10
Hire car	5	28	-	-

Type of trip

There is wide variation in the type of trips being made to each of the four locations. St Andrews represents a middle ground (along with Stratford) were day and overnight visits are broadly in line. In Stirling and Windsor the contrast in figures for day and overnight stays suggests that further research is required to confirm these findings.

Table D: Type of trip

	St Andrews	Stirling	Stratford	Windsor
	%	%	%	%
Day visit	55	17	65	83
Overnight	45	83	35	17

Frequency of visit
The high number of repeat visitors to St Andrews is confirmed when viewed against other data. At 34% and 58%, Stirling and Windsor boast good levels of repeat visits, yet St Andrews repeat visitors constituted two-thirds of all recorded visits in 2010.

Table E: Frequency of visit

	St Andrews	Stirling	Windsor
	%	%	%
First time	33	66	42
Repeat	67	34	58

Type of accommodation
The high number of visitors staying with friends and relatives in St Andrews is not reflected elsewhere. This is a concern for accommodation providers in the city.

Table F: Type of accommodation

	St Andrews	Stirling	Windsor
	%	%	%
Serviced e.g. Hotel, B&B	35	71	62
Friends/relatives	44	16	19

Rating of visit
The high satisfaction levels amongst visitors to St Andrews and Windsor demonstrates that St Andrews is in good company in terms of comparable visitor experiences.

Table G: Rating of visit

	St Andrews	Windsor
	%	%
Exceeded	27	25
Matched	69	74

Overall satisfaction
Overall satisfaction ratings are high for all three locations, yet suggests there is marginal room for improvement in St Andrews. Ongoing monitoring of this and other base line data established in 2010 will allow the St Andrews Partnership to chart satisfaction levels.

Table H: Overall satisfaction

	St Andrews	Stratford	Windsor
MEAN score	8.8	8.1	9.1

Research Methodology
The methodological approaches applied to the studies in Stirling, Stratford and Windsor were sufficiently similar to allow comparisons to be made.

Stirling
Research: October 2010
Sample: 552
Method: Face-to-face interviews

Stratford
Research: November 2010
Sample: 616
Method: Online survey delivered via email

Windsor
Research: July 2010
Sample: 415
Method: Face-to-face interviews

Appendix 2: Survey questionnaire

ST ANDREWS VISITOR SURVEY: FINAL QUESTIONNAIRE

Respondent's name……………………………………………….Telephone……………………......................................

Address…………………………………………………………………………………….........................

…………………………………………………………………….Postcode……………………………………

This interview has been conducted in accordance with instructions and the MRS Code of Conduct.
Interviewer name…………………………………………………
Date……………………………………………………..

Good morning/afternoon, my name is ...... from Scotinform Ltd. We are talking to visitors to St Andrews on behalf of the St Andrews Partnership. We are keen to hear about your visitor experience today to help us improve the town for the benefit of future visitors. The interview should take approximately 10-15 minutes to complete.

CLASSIFICATION

Interview day:

Monday	1
Tuesday	2
Wednesday	3
Thursday	4
Friday	5
Saturday	6
Sunday	7

Interview time:

Before midday	1
Midday – 2pm	2
2pm – 6pm	3

Interview location: TBA

Church Square/Logies Lane area	1
British Golf Museum/R&A/Bruce Embankment	2
Harbour (at footbridge)	3
Bus Station	4
East End of North Street (Cathedral)	5
Entrance to car park at West Sands	6
North Haugh car park	7

Gender:

Male	1
Female	2

Marital status:

Single	1
Living with partner	2
Divorced/separated	3
Married	4
Widowed	5

Current working status:

Working full-time (more than 30 hrs a week)	1
Working part-time (less than 30 hrs a week)	2
Self-employed	3
Retired	4
Unemployed	5
Out of work due to disability/illness	6
Carer for home/children	7
Full-time education	8
Other PLEASE SPECIFY	X

Children under 16 in household:

Yes	1
No	2

Highest earner in household:
Job title: position/rank/grade ....
Industry/type of company ....
Number of staff ....
Qualifications/degree/apprenticeship..........................

SHOWCARD
QSA
Which of the following best describes why you are in St Andrews

Staying away from home for at least one night for the following purposes: on holiday, visiting friends and relatives on holiday, on business	1	If any code 1 -3 Continue to QSB
On a day trip to the area from another part of Scotland (not necessarily staying overnight in St Andrews)	2	
On a leisure day trip from home for at last three hours duration	3	
On a leisure day trip from home for a duration of under three hours	4	If only code 4-6 CLOSE INTERVIEW & ENSURE RECORDED IN CONTACT SHEET
On a leisure day trip from home, main purpose being shopping or personal business (eg going to the dentist, attending a funeral, etc)	5	
Staying overnight visiting friends and relatives but not ON holiday (eg duty visits)	6	

You may only interview one member of a family or party or informal group. To help you make a selection please ask the following 'Birthday question' when interviewing anyone in a group. If interviewing a respondent who is alone or only person over 16 yrs at time of interview, please write in N/A below.

QSB – I can only interview one member of your family/party/group so to help me make a selection can I please ask each of you the month in which your birthday falls.

Interviewer record each month mentioned

……...

Interviewer instructions

Select for interview the respondent whose birth month is next in the calendar year. Check that the respondent is over 16 or over before continuing with the interview.

QSC
Are you resident of OR Do you live in Fife?

Yes	1	CHECK QUOTA BEFORE CONTINUING TO Q1. MAXIMUM 25% RESIDENTS OF FIFE IF SCREEN OUT ENSURE RECORDED ON CONTACT SHEET
No	2	

Q1 Which of the following best describes the main purpose of your trip to St Andrews?

On a holiday away from home	1
On a day out/day trip	2
Visiting friends/relatives on holiday	3
Visiting friends/relatives – other reason	4
Shopping only	5
Business trip/conference/exhibition	6
Sporting event	7
Other PLEASE SPECIFY	X

____

Q2 Is this your first visit to St Andrews?

Yes	1	GO TO Q4
No	2	ASK Q3

ASK REPEAT VISITORS ONLY, OTHERS GO TO Q4

Q3 Including this visit, how many times have you visited St Andrews in the past five years?

Twice	1
Three times	2
Four times	3
Five times	4
6-9 times	5
10 times +	6
Don't know/can't remember	y

ASK ALL

Q4 What are your main reasons for visiting St Andrews today? DO NOT PROMPT. MULTICODE POSSIBLE

To visit friends/family	1
To visit a student here	2
To visit specific place of interest, eg museum, Castle, etc	3
To visit the theatre	4
To visit the cinema	5
Shopping (pre-planned for specific items)	6
Shopping (browsing, just looking at shops)	7
Sea/coast/beach	8
Meeting friends/family from outside St Andrews	9
To play golf	10
To watch golf	11
To play other sport	12
To watch other sport	13
Eating out/restaurants	14
Not seen before/wanted to see it	15
Beautiful/scenery/picturesque	16
To see buildings/architecture	17
To visit University for academic reasons	18
To visit University as a prospective student	19
To find out more about the history of the area/St Andrews	20
For work/business trip/attending conference	21
Other PLEASE SPECIFY	22

SHOWCARD

Q5 Did you look at any of the following to find out more before visiting St Andrews?

Internet/website PLEASE SPECIFY	1
VisitScotland website	2
Brochure/Guidebook PLEASE SPECIFY	3
Travel agent/tour operation information	4
Social networking site, eg Facebook PLEASE SPECIFY	5
Other PLEASE SPECIFY	X
Didn't look at any information before visiting St Andrews	y

Q6 Is there anything you would have liked to have known about St Andrews before your visit but were unable to find?

Yes	1	**ASK Q7**
No	2	**GO TO Q8**
Don't know	3	GO TO Q8

Q7 Please tell us what information you were unable to find before your visit to St Andrews? WRITE IN RESPONSE

....

....

Q8 **During your visit, what are the main activities you have undertaken/will be undertaking whilst in St Andrews? DO NOT PROMPT. MULTICODE POSSIBLE**

	Have undertaken	Will undertake
Walked around the town	1	1
Shopping	2	2
Visited museum	3	3
Visited attractions such as St Andrews Castle	4	4
Pubs/bars/restaurants/cafes	5	5
Art galleries/exhibitions	6	6
Concert	7	7
Arts/crafts	8	8
Byre Theatre	9	9
Cinema	10	10
Played golf	11	11
Watched golf	12	12
Played other sport	13	13
Watched other sport	14	14
Visited friends and relatives	15	15
Attended conference, business event	16	16
Visited gardens, eg Botanic Garden	17	17
Visited beach	18	18
General sightseeing	19	19
Walk along Fife Coastal Path	20	20
Went on guided tour	21	21
Visited the University	22	22
Other PLEASE SPECIFY	X	x

Q9 **What have you most enjoyed about your visit to St Andrews? DO NOT PROMPT. ONE ANSWER ONLY**

Architecture/buildings	1
Friendly people	2
History/culture	3
Golf/courses	4
Well kept/maintained town	5
Restaurants/eating places	6
Lots to do	7
Lots for children to do	8
Parks/gardens	9
Shopping	10
Beach	11
Scenery	12
Guided tour	13
Seeing friends/relatives	14
Weather	15
Nothing	16
Only just arrived, too early to say	17
Other PLEASE SPECIFY	X
Don't know	y

Q10 Is there any aspect of your visit to St Andrews you have not enjoyed? DO NOT PROMPT. MULTICODE POSSIBLE.

Architecture/buildings	1
The people	2
History/culture	3
Golf/courses	4
Not well kept/not maintained town	5
Restaurants/eating places	6
Not enough to do	7
Not enough for children to do	8
Parks/gardens	9
Shops (quantity/variety)	10
Shops (quality)	11
Beach	12
Scenery	13
Expensive	14
Parking	15
Weather	16
Nothing	17
Only just arrived, too early to say	18
Other PLEASE SPECIFY	X
Don't know	y

SHOWCARD

Q11 Thinking about your overall experience of visiting St Andrews, please tell us how you would rate the customer service, quality of facilities and value for money you have received here?

	Very good	Good	Adequate	Poor	Very poor
Customer service	1	2	3	4	5
Quality of facilities	1	2	3	4	5
Value for money	1	2	3	4	5

SHOW CARD

Q12

Which of these methods of transport did you use to get to St Andrews today? MULTICODE POSSIBLE (AND FOR RESPONDENTS TRAVELLING BY TRAIN)	
Private car	1
Hire car	2
Cycle	3
Motorbike	4
Taxi	5
Walked	6
Motor home	7
On a coach tour	8
Train to Leuchars	9
Public bus from Leuchars	10
Public bus from elsewhere in Scotland	11
Taxi from Leuchars	12
Hire car from Leuchars	13
Private car from Leuchars	14

Q13	**Does your trip to St Andrews involve staying away from home overnight?**		
	Yes	1	ASK Q14
	No	2	GO TO Q17

Q14	**How many nights are you staying in total away from home? WRITE IN**	....
Q15	**How many of those nights are you staying in St Andrews? WRITE IN**	....
Q16	**How many nights are you staying in Scotland (not including St Andrews)? WRITE IN**	....

ASK Q17 AND Q18 OF THOSE STAYING IN ST ANDREWS, OTHERS GO TO Q19

Q17	**Which of the following best describes the type of accommodation you are staying in St Andrews?**	
	Staying with friends and relatives	1
	Guesthouse/Bed and breakfast	2
	Self-catering	3
	Hotel– large i.e. Old Course Hotel, Fairmont Hotel or Rusacks Hotel	4
	Hotel – other	5
	Static caravan – rented	6
	Static caravan - owned	7
	Touring caravan	8
	Hostel	9
	University accommodation	10

Q18	**How did you book your accommodation in St Andrews?**	
	Direct with accommodation via phone	1
	Emailed accommodation	2
	Direct with accommodation via internet	3
	Direct with accommodation via letter	4
	Through the Tourist Information Centre	5
	Agency/booking company/tour operator	6
	Booked on arrival	7
	Internet booking agency e.g hotelrooms.com, visitscotland.com	8
	Not applicable, staying with friends and relatives	9
	Other PLEASE SPECIFY	X

ASK ALL

Q19	**Have you visited any of the following during your visit? READ OUT LIST**	
	Dunfermline	1
	Kirkcaldy	2
	Falkland	3
	Cupar	4
	The East Neuk: Anstruther, Crail, St Monans, Pittenweem, Elie	5
	Haven't visited anywhere else in Fife	6
	Other Fife PLEASE SPECIFY	x
	Don't know	y

SHOW CARD

Q20	**How did your visit to St Andrews compare with your expectations prior to visiting?**	
	Better than expected	1
	About the same as expected	2
	Not as good as expected	3
	Didn't know what to expect	4

Q21 **Please rate your overall experience of St Andrews on a scale of 1 to 10 where 10 is the highest. WRITE IN NUMBER ....**

Q22 **How could your visit to St Andrews have been improved upon? ....**
...
..

SHOW CARD
Q23 **How likely are you to return to St Andrews in the future?**

Very likely	1
Quite likely	2
Neither likely nor not likely	3
Not likely	4
Not at all likely	5
Don't know	x

SHOW CARD
Q24 **I am going to read out some statements about St Andrews and I'd be grateful if you could tell me whether you agree or disagree with each of them. READ OUT STATEMENTS. CIRCLE ONE RESPONSE PER STATEMENT**

	Agree strongly	Agree	Neither agree nor disagree	Disagree	Disagree strongly	Don't know/not applicable
St Andrews is a place that is well looked after	1	2	3	4	5	6
I found it easy to find my way around the town	1	2	3	4	5	6
I am happy with car parking arrangements in the town	1	2	3	4	5	6
St Andrews is a welcoming place	1	2	3	4	5	6
It has been easy to book play on the golf courses in St Andrews	1	2	3	4	5	6
Overall I have had good value for money here	1	2	3	4	5	6

Q25	**Approximately, how much have you spent, in total, during your visit to St Andrews £ ....**	

Q26 **How much money have you spent on each of the following during your visit to St Andrews? WRITE IN AMOUNT FOR EACH OF THE FOLLOWING.NOTE: SHOULD ADD UP TO TOTAL AT Q25**

Accommodation (including food and drink at accommodation)	£............
Eating out	£.............
Other food shopping	£............
Entertainment (including entry fees/tickets)	£............
Non-food shopping	£............
Golf/related items	£...........
Other items	£............

Q27 How many people, including yourself, are in your group today? WRITE IN TOTAL NUMBER

....

Q28 Please tell me the number of people, including yourself, in your group in each of the following categories. WRITE IN NUMBERS AGAINST AGE AND UNDER GENDER

	Male	Female
Under 16	....	....
16-24	....	....
25-34	....	....
35-44	....	....
45-55	....	....
56-65	....	....
66+	....	....

Q29 Could you tell me whether any of the people in your group has a long-standing health problem or disability that limits their daily activities or the kind of work they do?

Yes	1
No	2

Q30 Where do you usually live?

Scotland	1	**ASK Q31**
Rest of UK	2	**ASK Q31**
Overseas	3	**GO TO Q32**

ASK Q31 OF THOSE WHO LIVE IN THE UK AT Q30, OTHERS GO TO Q32

Q31 Please could you give me your postcode? Please note that this is not for use other than to analyse where visitors to St Andrews are coming from.

ASK Q32 OF THOSE WHO LIVE OVERSEAS AT Q30, OTHERS GO TO Q33

Q32 In which country do you live?

Australia	1
New Zealand	2
United States	3
Canada	4
France	5
Germany	6
Spain	7
Italy	8
Ireland	9
Other PLEASE SPECIFY	x

ASK ALL

Q33 Finally, is there anything else you would like to say about your visit to St Andrews today? WRITE IN RESPONSE

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